every policy is connected

EPiC USER MANUAL

Powered by United Nations Economic Commission for Africa

UNITED NATIONS ESCAP
Economic and Social Commission for Asia and the Pacific

Table of Contents

Table of Contents ii
List of Figures iii
Glossary vi
1. Introduction 1
2. How to Login 1
3. General Overview 2
3.1 EPiC User roles 2
4. Components 3
4.1. About Profile 4
4.1.1 How to update profile information 4
4.1.2 How to Change your password 5
4.1.3 How to upload/change profile picture 6
4.2. Dashboard Menu 7
5. Indicator Frameworks 9
5.1. How to Create Indicator Framework 11
5.2. How to Create Indicators 12
5.3. How to Download & Import Templates 13
5.3.1 How to download templates 13
5.3.2 How to edit templates 13
5.3.3 How to Import Templates 15
6. Core Concepts 18
6.1. How to Add National Core Concepts 18
7. Reports 20
7.1 How to Generate Progress Report 20
8. Administrations 21
8.1. Users & Roles 21
8.2. Countries 23
9. Policies 24
9.1. Accessing a Policy 24
9.2. How to start analyzing a new policy 26
9.2.1 Policy Overview and Dashboard 28
9.2.2 Phase I: Preparation work for the Policy Review 30
9.2.3 Phase II: Data entry of the Policy 37
9.2.4 Phase III: Review of Policy Coverage 47
9.2.5 Phase IV: Review of Indicator Framework 52
9.3. How to Move a policy to the next phase 56
9.4. How to Generate Output Report for a Policy 57

List of Figures

Figure 1: EPiC tool login page 1
Figure 2: EPiC landing page 1
Figure 3: EPiC landing page - List of policies for the country context 3
Figure 4: Description for section 4.1 of the Policies page 3
Figure 5: Description for section 4.2 of Policies page 4
Figure 6: Account Profile page - Edit profile settings 4
Figure 7: Updating/editing your profile information 5
Figure 8: Account profile page - Change Password 5
Figure 9: Change password page 6
Figure 10: Account profile page - Edit Profile Settings 6
Figure 11: Uploading a profile picture 7
Figure 12: Dashboard menu 7
Figure 13: Theme-Customizer pop up 8
Figure 14: Indicator Framework menu 9
Figure 15: List of the Global Indicator Frameworks 9
Figure 16: List of the Regional Indicator Frameworks 9
Figure 17: List of the National Indicator Framework 10
Figure 18: List of the policy indicator frameworks for a country context 10
Figure 19: List of indicators created under an indicator framework 10
Figure 20: Creating an Indicator framework 11
Figure 21: New framework created and adding indicators 11
Figure 22: National Indicator Framework list 12
Figure 23: Indicators list for a specific indicator framework 12
Figure 24: Creating an indicator 13
Figure 25: Downloading a template 13
Figure 26: Excel file of the Indicator template when downloaded 14
Figure 27: Enable Content and Go to Indicators 14
Figure 28: Indicators Data Entry Excel sheet 15
Figure 29: Confirmation the indicators are saved and validated 15
Figure 30: Importing a template 15
Figure 31: Importing Wizard window 16
Figure 32: Uploading the indicator template 16
Figure 33: Summary of the template content 16
Figure 34: Indicator template imported 17
Figure 35: List of Global and National Core Concepts 18
Figure 36: Creating a National Core Concept 18
Figure 37: New national Core Concept added 19
Figure 38: Creating an overall Progress Report 20
Figure 39: EPiC Progress Report 20

Figure 40: Administration sub-menus 21
Figure 41: User's List 21
Figure 42: Creating a new user 22
Figure 43: User's Basic Details page 22
Figure 44: Administrator - Edit Profile Settings 23
Figure 45: List of countries visible to the Administrator 23
Figure 46: Policies menu 24
Figure 47: The Create New Policy button 24
Figure 48: Main sections view of a policy at each phase 25
Figure 49: Changing policy phase to review 25
Figure 50: Phase names coloring description 25
Figure 51: Help icon available at each phase 26
Figure 52: The Create New Policy button 26
Figure 53: Creating a new policy to be analyzed 26
Figure 54: Detail view of newly created policy 27
Figure 55: New policy created 27
Figure 56: Accessing the policy overview and dashboard pages 28
Figure 57: The dashboard pages for each of the four phases 29
Figure 58: Phase I - Assigning relevance of CC with respect to the policy 30
Figure 59: Phase I - Relevance assigned to core concepts 31
Figure 60: Policy Indicator Window 31
Figure 61: Phase I – Creating a *policy* Indicator 32
Figure 62: List of policy indicators created 32
Figure 63: Relevant Indicator Frameworks window 33
Figure 64: Adding Relevant Indicator Framework 33
Figure 65: Newly added relevant indicator frameworks 34
Figure 66: List of all relevant indicator frameworks added 34
Figure 67: Policy Structure window 35
Figure 68: Creating a policy structure 35
Figure 69: List of policy structures 35
Figure 70: Outcomes window 36
Figure 71: Creating an Outcome 36
Figure 72: List of outcomes created for the policy structures 37
Figure 73: Initial IAs window 37
Figure 74: Adding Initial Issues for Action 38
Figure 75: List of all the initial IAs added 38
Figure 76: Consolidate IA Window 39
Figure 77: List of Unconsolidated IAs 39
Figure 78: Adding additional meta data to the consolidated IA 40
Figure 79: Adding Target Groups in Doc and/or Recommended Target Group 40
Figure 80: Save a consolidated IA after adding description 41

Figure 81: List of all consolidated IAs 41
Figure 82: IA/CC Mapping Window 42
Figure 83: Adding Core Concepts to be mapped to the IAs 42
Figure 84: Select Core Concepts Window 43
Figure 85: List of all mapped core concepts 43
Figure 86: Consolidated IAs mapped with and without Core Concepts 44
Figure 87: IA/CC combination window 45
Figure 88: IA/CC combination Adding Indicators 45
Figure 89: Select Indicator window 45
Figure 90: Add a reason for not having indicators 46
Figure 91: List of added indicators to IA/CC combination grouped according to their framework 46
Figure 92: List of the IA/CC combinations after indicator have been added 47
Figure 93: Core Concept Coverage Review window 48
Figure 94: List of IAs 48
Figure 95: Review Indicator Frameworks window 49
Figure 96: Viewing and Reviewing list of indicators with/without associated IAs 49
Figure 97: Creating a new IA on phase III 50
Figure 98: IAs created on Phase III will display as PROPOSED 50
Figure 99: Review Outcomes window 51
Figure 100: List of IAs with no outcome 51
Figure 101: Viewing the list of outcomes and mapped IAs 51
Figure 102: Review IA/CC combination window 52
Figure 103: Description of the columns on phase IV 53
Figure 104: Reviewing an IA/CC combination with status PENDING 54
Figure 105: Reviewing an IA/CC combination with status NO INDICATOR 54
Figure 106: Select Indicator window 55
Figure 107: Create Indicator window 55
Figure 108: List of added Indicators added to IA/CC combinations the were not associated 55
Figure 109: Options to add target groups to the final target group 56
Figure 110: Confirmation prompt window for **Approve** or **Hold** IA/CC combination 56
Figure 111: Policy reference number 56
Figure 112: Edit policy page 57
Figure 113: Confirmation window for moving a policy to the next or previous phase 57
Figure 114: Report sub-menus available for each phase 57
Figure 115: Phase I, Phase II, Phase III output reports that can be generated 58
Figure 116: Phase Report for Individual Outputs 58
Figure 117: Phase IV - Final report generated for a policy 59
Figure 118: Saving Phase IV generated report as pdf 61
Figure 119: Options available for a particular graphical representation 61

Glossary

Issues for Action (IA)	Priority issues that the plan or policy is aiming to address. IAs can denote either a problem that requires action or a condition that needs to be maintained. IAs can generally be extrapolated from the narrative or the logframe of the policy document. e.g. *Insufficient primary school teachers with proper qualifications* Identifying IAs is a key starting point in identifying the objectives of the policy, which in turn will lead to a more relevant monitoring framework.
Core Concepts (CC)	A set of 29 concepts extracted from international development principles which help assess four dimensions of development – economic, environmental, institutional and social – in the policy. e.g. *Ecosystem impacts, cultural responsiveness, human resources* These core concepts help assess whether the coverage of the policy document is adequate.
IA/CC Combination	An output from mapping IAs to relevant CCs. Each IA identified in the document may be considered highly relevant to one or more CCs. Each combination is thus referred to as a IA/CC Combination.
Reference Population (RP)	Overall population or object that is being addressed or impacted upon by the issue requiring action. e.g. *All citizens, primary schools, health care facilities, ecosystem*
Target Group (TG)	Subsets of the reference population which may require specific focus due to their vulnerability or importance to the issue at hand. Target groups may be explicitly specified or implied in the policy. e.g. *Rural population, children with disabilities, migrant workers*
Outcome	A description of the desired result and target of the policy, which often includes a measure and a specified period of achievement. e.g. *Implement social protection systems and measures by 2030*
Indicator	A measure that provides meaningful evidence to help monitor progress against key national issues for which the desired outcomes are sought. Indicators are often found in an outcome table (i.e., logframe) or in an Appendix towards the end of the policy document. e.g. *Proportion of population that has access to public transport*

1. Introduction

EPiC – Every Policy is Connected

EPiC (Every Policy is Connected) is a tool that facilitates policy-data dialogue aiming to identify policy priorities as well as data needs. The tool integrates the four dimensions of development (Economic, Environmental, Institutional and Social) in every policy plan and develops a comprehensive indicator framework for policy monitoring.

2. How to Login

Step 1. On your preferred browser type in the URL https://epic.unescap.org. You will be redirected to **Figure 1** below. ***(Note: EPiC works better with Chrome & Firefox)***

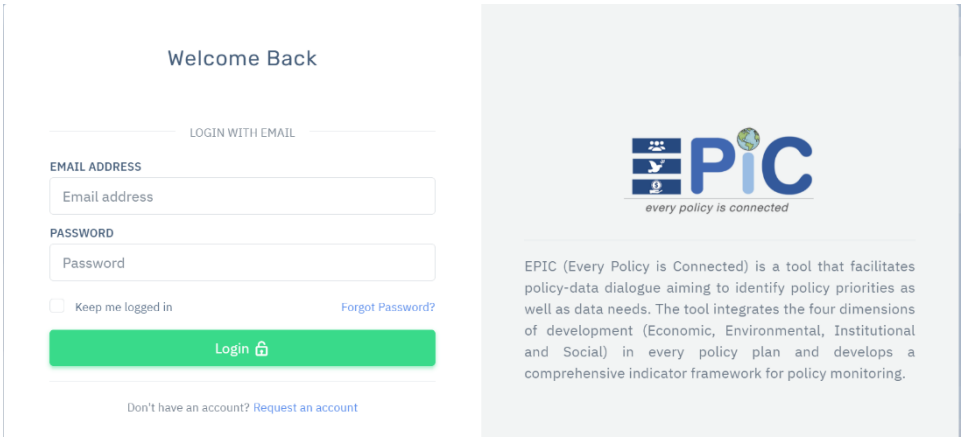


Figure 1: EPiC tool login page

Step 2. Please type in your email address and password and click **Login** to access the system.

Step 3. After login, you will be redirected to the landing page in **Figure 2**, which lists all policies for the country in review

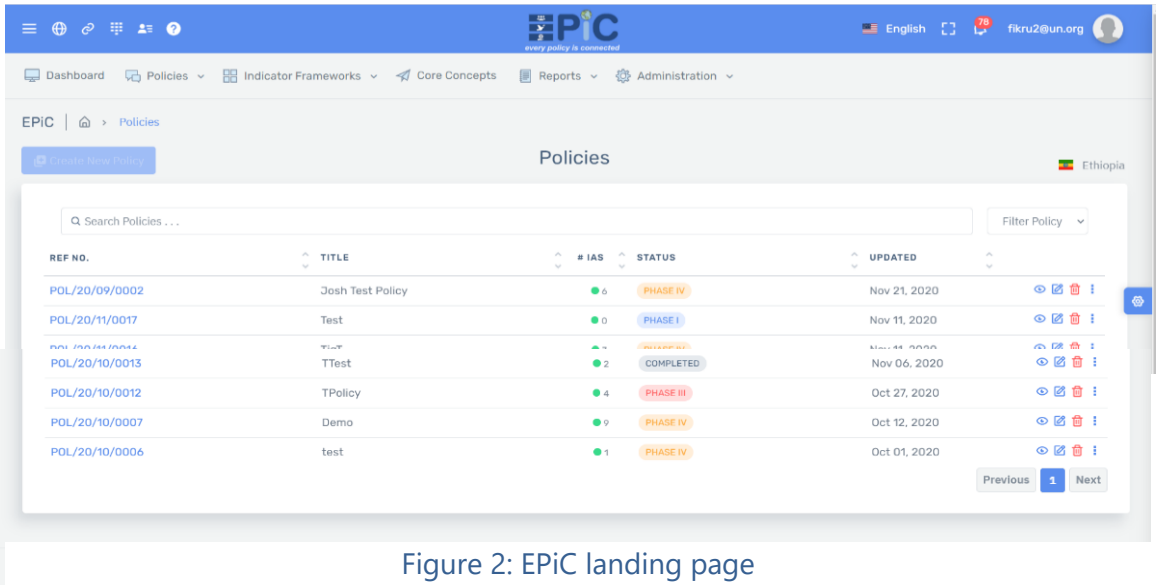


Figure 2: EPiC landing page

3. General Overview

This tool aims to enhance policies and their associated monitoring and evaluation framework. Policy structure is first defined by its sections and sub-sections where policies Issues for actions (IAs) are identified. These Issues for Action get linked to one or more Core Concepts (CCs) which forms IA/CC combinations. For each IA/CC combination relevant Global, Regional, National and Policy Indicators get identified to track the progress of that IA/CC combination.

The tool has four phases after a policy has been created. Under each phase there are additional steps users must go through before proceeding to the next phase.

Users will be able to read any of the policies and its details in the country context the user has access to. The users who will be working at each phase of the policy should be given permission to work at that phase. The permission can be given at any phase or stage. The assigned users can **edit** only the phase they have permission for. Each of the phases and their detailed steps are described further below.

3.1 EPiC User roles

In the EPiC system there are five main different roles.

- **FRAMEWORK_MANAGER:** users assigned with this role are responsible for creating and managing the indicator frameworks at the **Global** and **Regional** level.
- **NATIONAL_FRAMEWORK_MANAGER:** users assigned with this role are responsible for creating and managing an indicator framework that will only be available at the **National** level for their assigned country context.
- **POLICY_CREATOR:** users assigned this role are responsible for creating a policy that will be analyzed and go through the four phases of the tool for the assigned country context.
- **POLICY_USER_MANAGER:** users assigned with this role are responsible for managing and assigning roles to users who will work at each phase of a policy within the given country context
- **ADMINISTRATOR:** users assigned with this role are responsible for the overall managing and administration of the EPiC tool.

4. Components

The main components of the EPiC tool are described below. When you have successfully logged in, you are first redirected to the Policies list page. In this page you have the main navigation menus and the policies within the country context, as indicated in Figure 3 below. The different sections are described below.

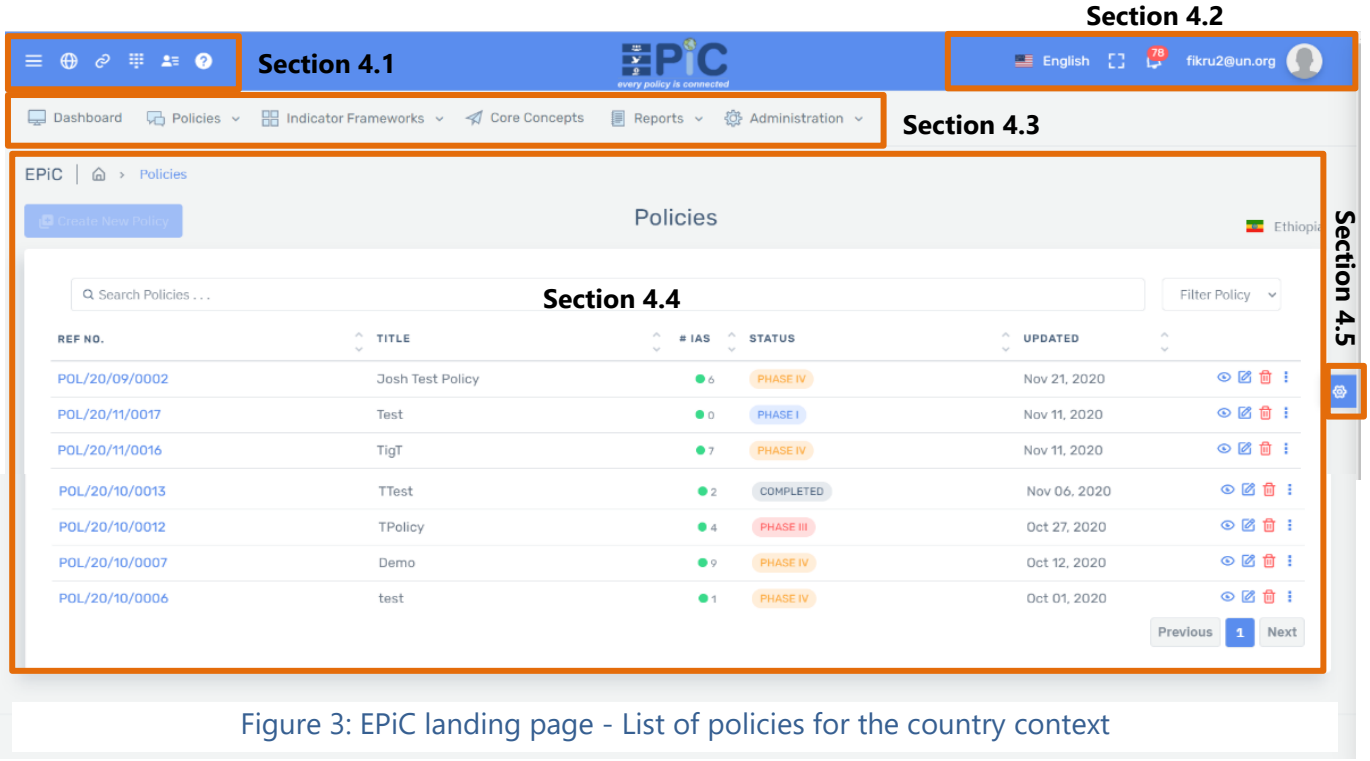


Figure 3: EPiC landing page - List of policies for the country context

Section 4.1. This section contains icons that redirect you to other pages of the EPiC tool.

Section 4.2. This section in Figure 5 below allows users to perform different actions.

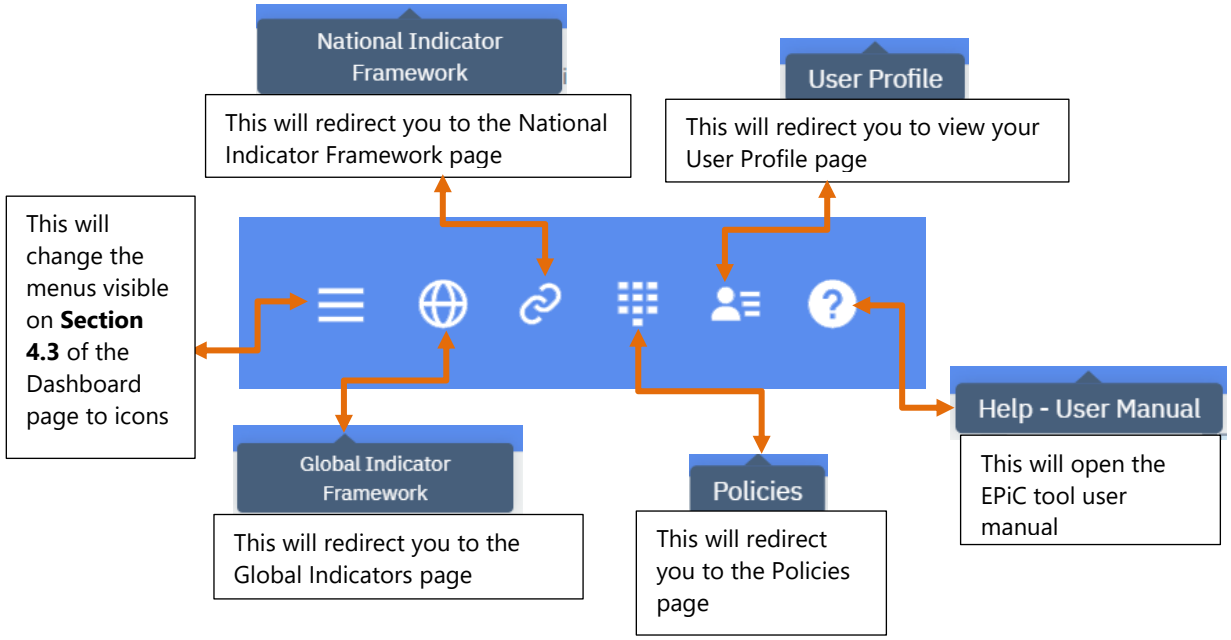


Figure 4: Description for section 4.1 of the Policies page

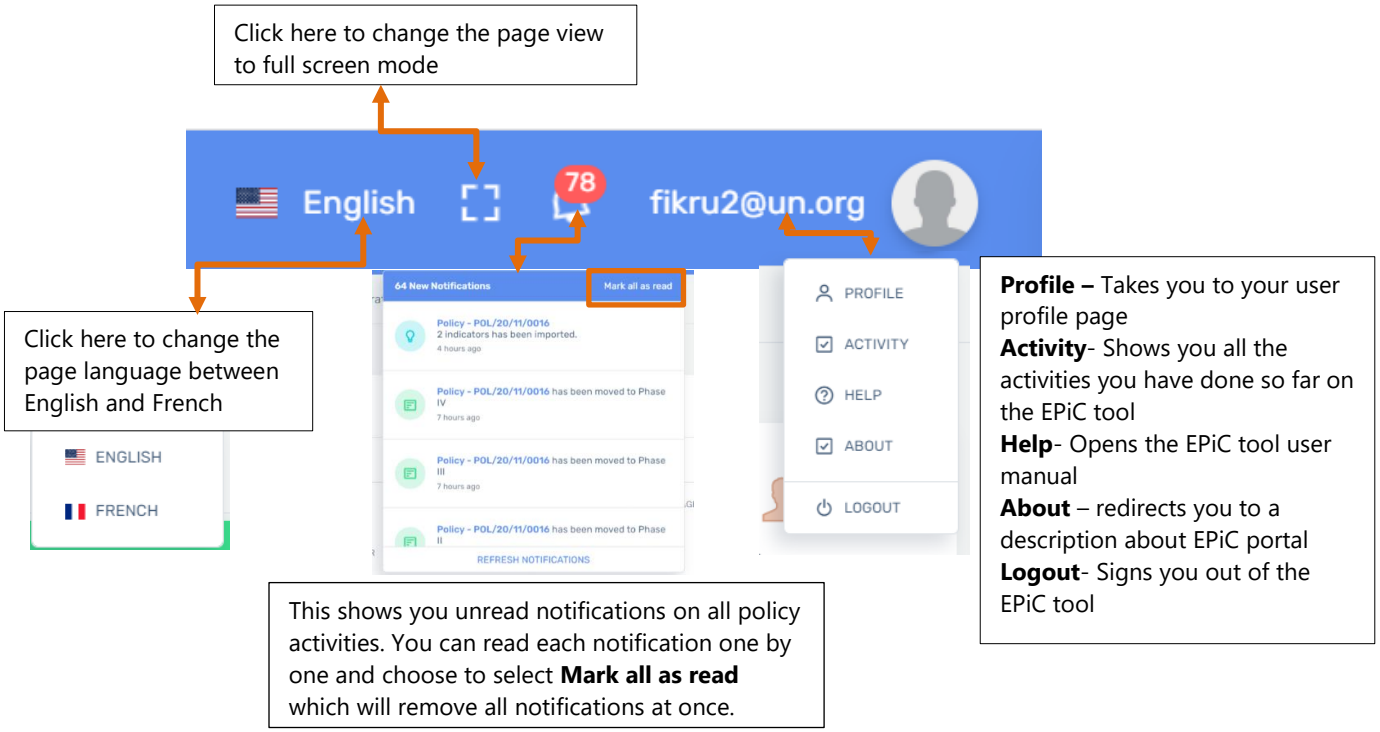


Figure 5: Description for section 4.2 of Policies page

4.1. About Profile

In this section, you have the option to edit your profile, change your password or upload a profile picture.

4.1.1 How to update profile information

Step 1. To update your profile information, go to **Profile** to open account profile page.

Step 2. From the account profile page, please click **Edit Profile settings** as indicated in Figure 6 below.

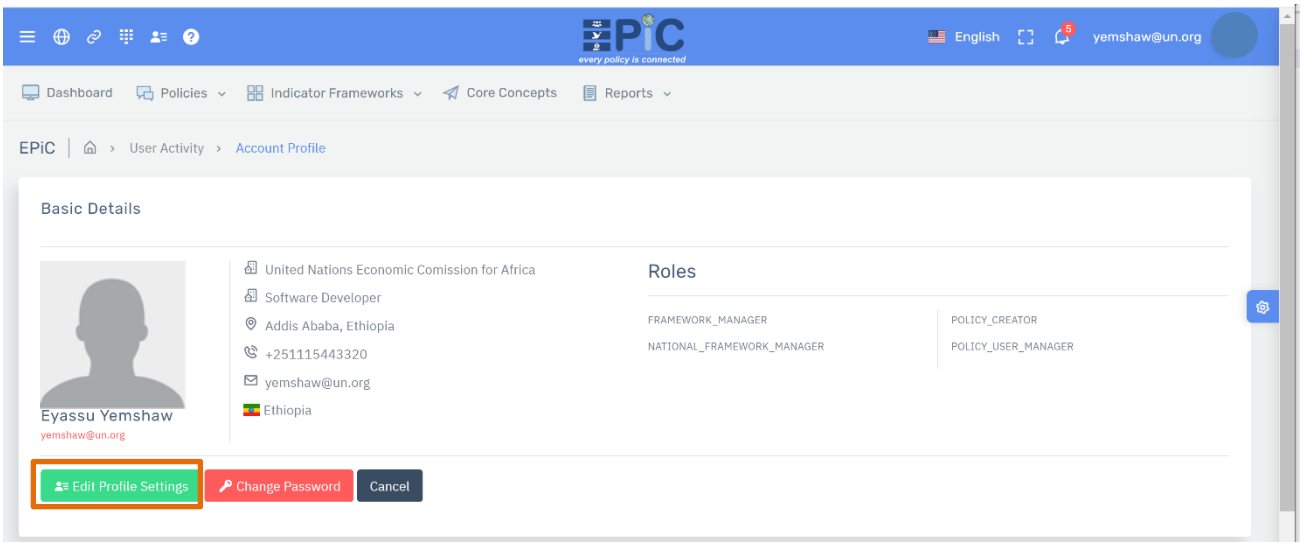


Figure 6: Account Profile page - Edit profile settings

Step 3. You will be redirected to the edit profile settings page. As indicated in Figure 7 below, you edit general information.

Step 4. You can also see the country of scope and the roles that have been assigned to you.

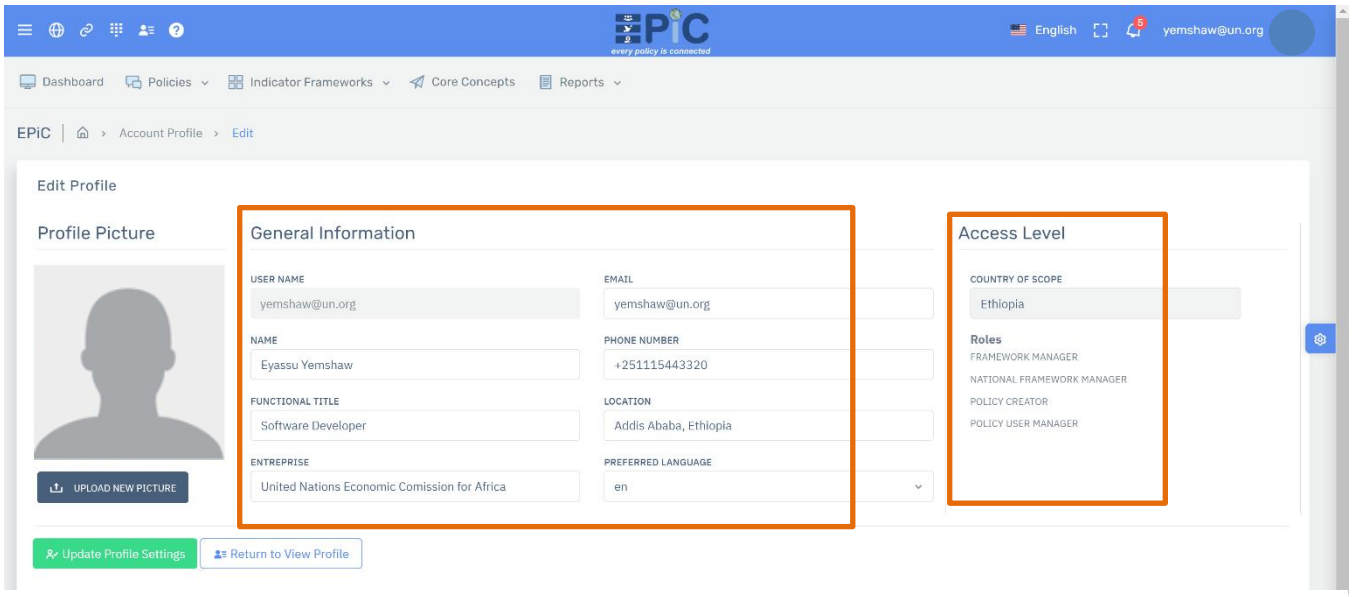


Figure 7: Updating/editing your profile information

4.1.2 How to Change your password

Step 1. To change your password, go to **Profile,** as seen above in Figure 5.

Step 2. You will be redirected to your **Account profile** page in Figure 8 below. From here click **Change Password** as indicated below.

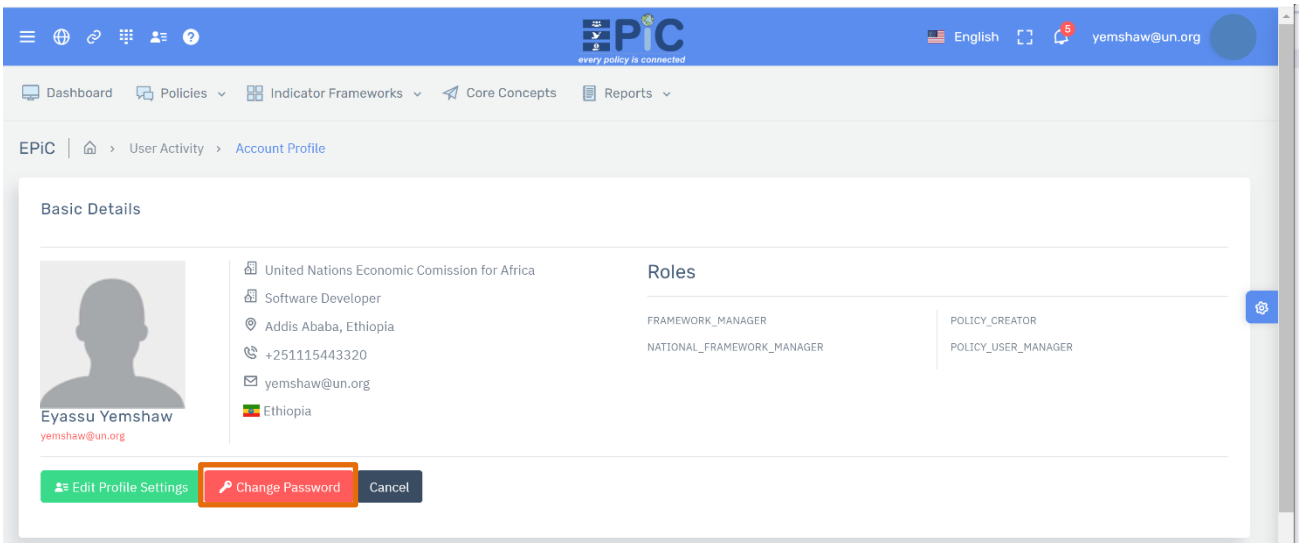


Figure 8: Account profile page - Change Password

Step 3. You will be redirected to the change password page seen in Figure 9 below. As required type in your current password and new password and confirmation in the space provided. When you are done click **Update Password**.

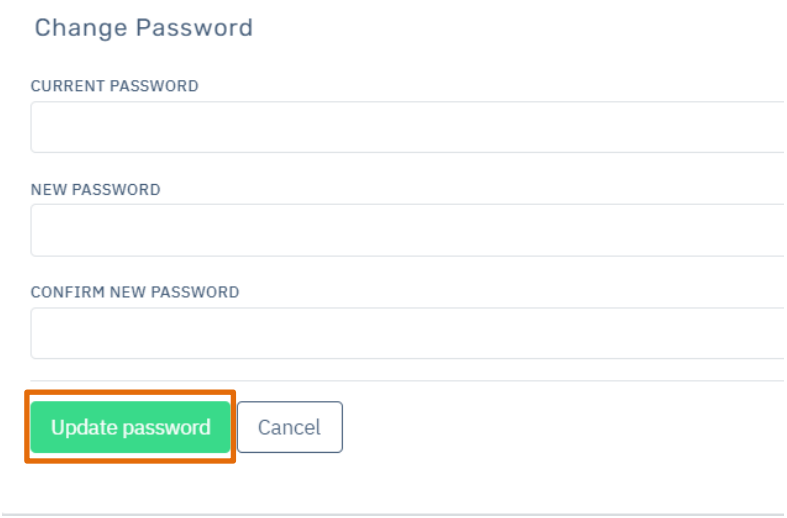


Figure 9: Change password page

Step 4. A message at the top of your window will be displayed to confirm you have successfully changed your password.

4.1.3 How to upload/change profile picture

Step 5. To upload or edit a profile picture go to **Profile** to open account profile page.

Step 6. From the account profile page, please click **Edit Profile settings** as indicated in Figure 10 below.

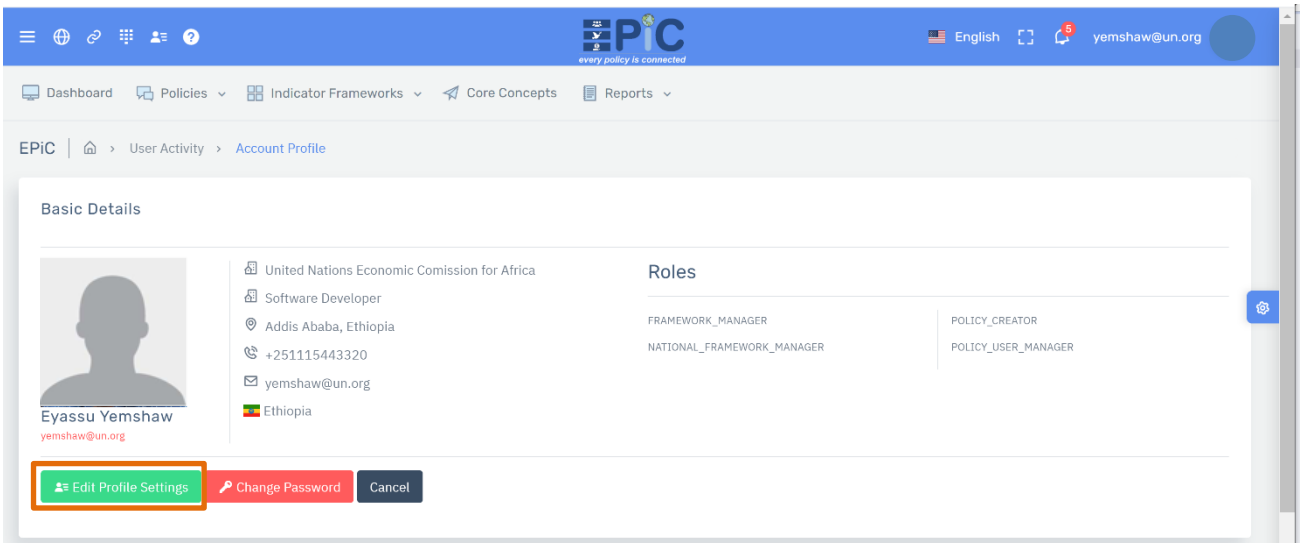


Figure 10: Account profile page - Edit Profile Settings

Step 7. You will be redirected to the edit profile settings page. As indicated in Figure 11 below, click **Upload New Picture**.

Step 8. You will be redirected to search and select your preferred picture.

Step 9. Once it is uploaded click **Update Profile Settings** and the newly added profile picture will be displayed.

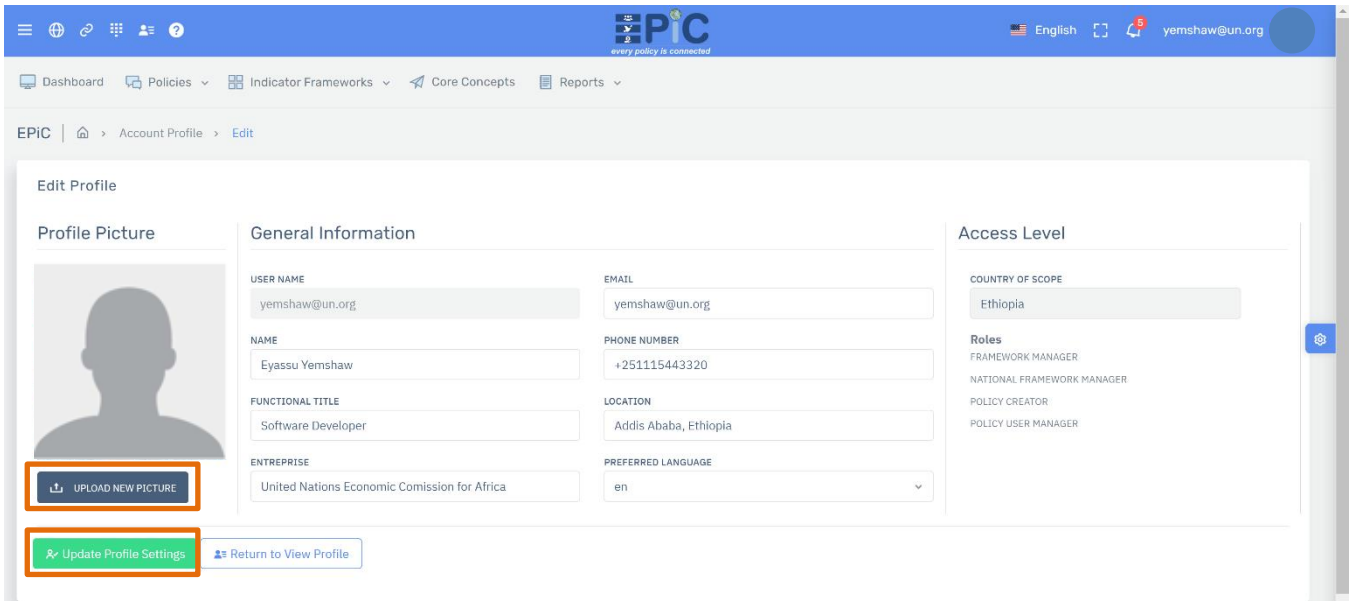


Figure 11: Uploading a profile picture

Section 4.3. This section contains the main navigation menu. Position your mouse over each menu and check the submenu available under any of the menus.

✓ The Dashboard menu is described below, and details of the remaining navigation menus are described further in this user guide

4.2. Dashboard Menu

When the dashboard menu is clicked, you will be redirected to **Figure 12** below. The dashboard page mainly displays an overview of the current country's context policies, indicator frameworks and latest updates.

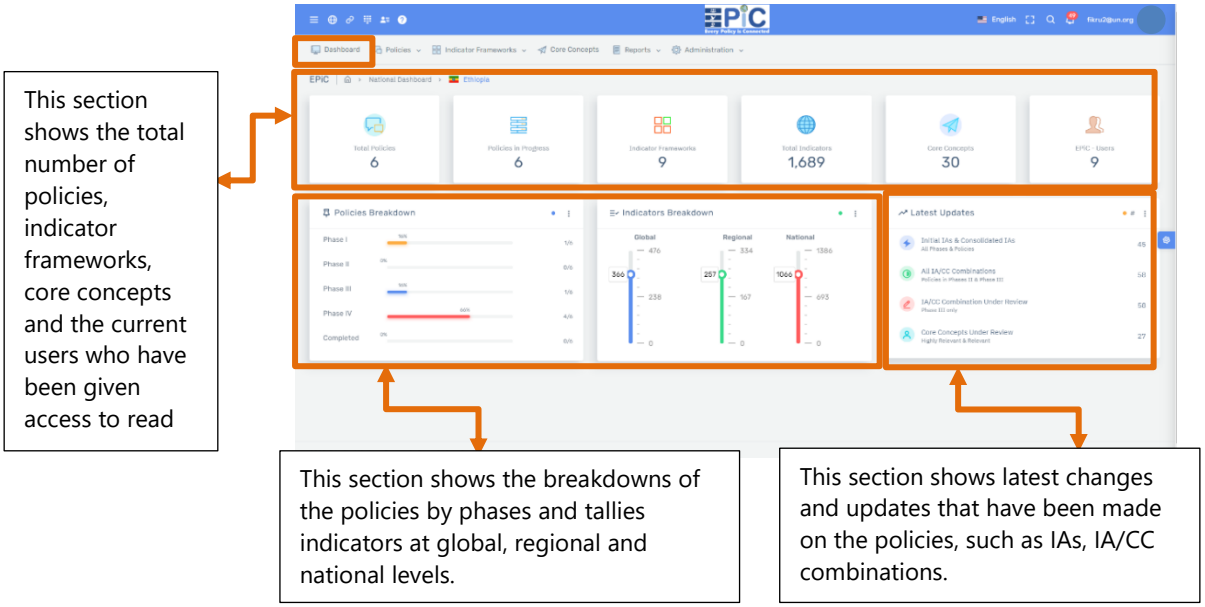
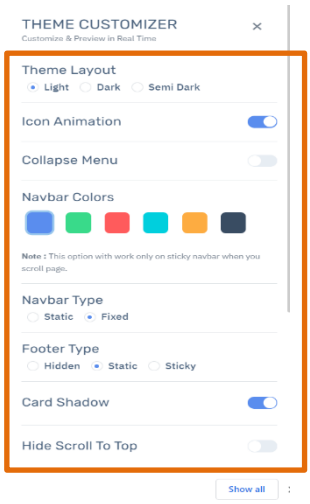


Figure 12: Dashboard menu

Section 4.4. This section displays a list of the policies that have been created for the country context. From this section you can create a new policy or click one of the policies to view. Please refer to Section 9 for further details.

Section 4.5. This settings gear icon (identified as Section 4.5 in Figure 3) opens a side menu of a Theme Customizer that will allow the user to customize the look of the EPiC tool as indicated in Figure 13 below.



Theme Layout – allows you to change the EPiC page theme.
Icon Animation- you can enable or disable the icon animations you see next to the menus
Collapse Menu- Can choose to collapse the main menu
Navbar Colors – allow you to change the color of the navbar
Navbar Type- allows you to fix the position of the navbar
Footer Type- allows you to fix the position of the footer.

Figure 13: Theme-Customizer pop up

5. Indicator Frameworks

Indicator frameworks are the basic structure that define the indicators. In the indicator framework section, we can view the list of available indicator frameworks. As indicated in **Figure 14** below we can choose to view the Global, Regional, National and Policy indicators.

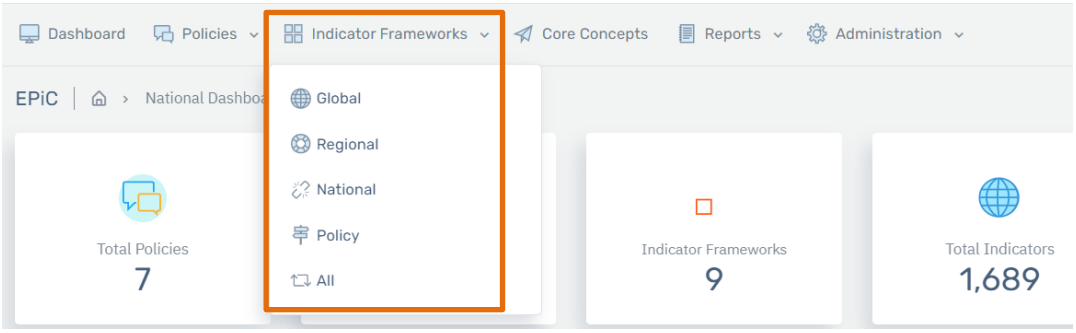


Figure 14: Indicator Framework menu

Global Indicator Framework

These indicator frameworks are from global initiatives (eg SDGs) and contain indicators and can be thus mapped to the key issues in the document.

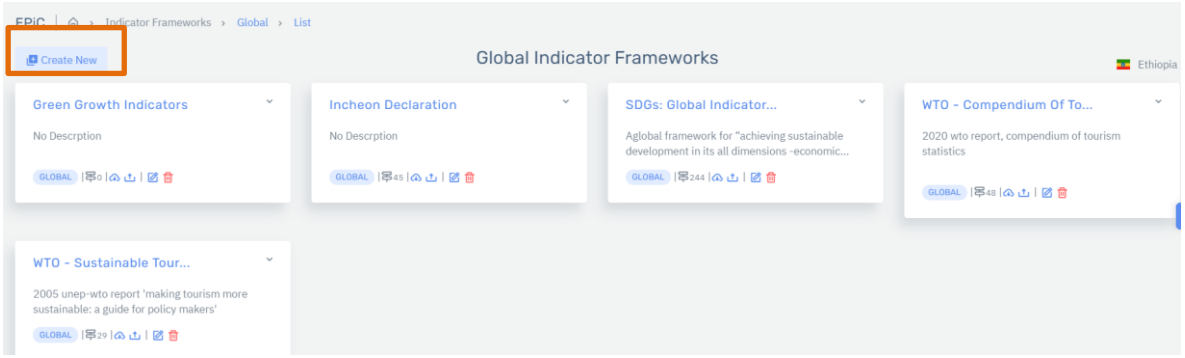


Figure 15: List of the Global Indicator Frameworks

Regional Indicator Framework

These indicator frameworks are those identified regional initiatives, of relevance, which contain indicators and can be thus mapped to the key issues in the document.

Figure 16: List of the Regional Indicator Frameworks

National Indicator Framework

These indicator frameworks are those which exist in other policies at the national level, which hold relevance to the country context policy being reviewed.

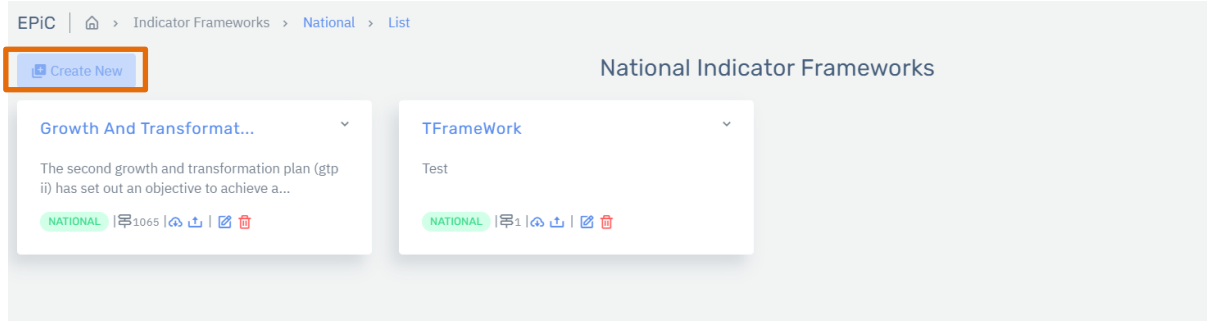


Figure 17: List of the National Indicator Framework

Policy Indicator Framework

These policy indicator frameworks are those contained and proposed in each of the policy to be analyzed for a particular country context.

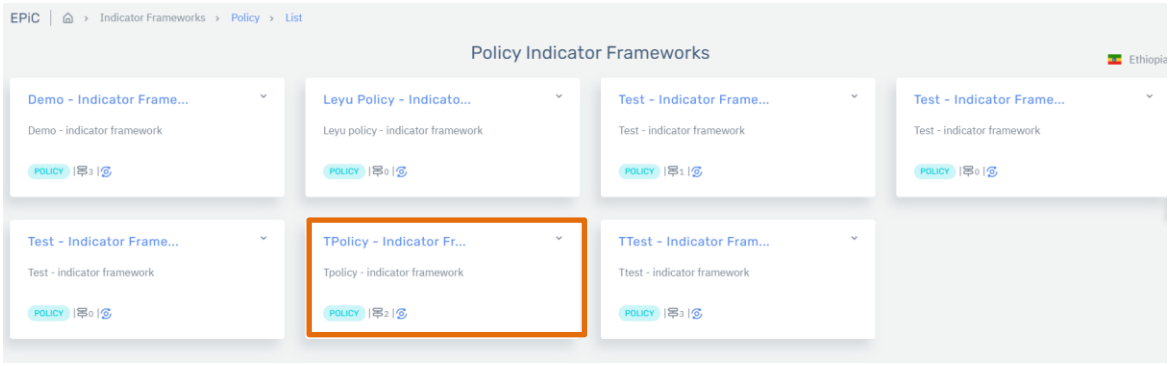


Figure 18: List of the policy indicator frameworks for a country context

- If you select one of the policy indicator frameworks from the above list, as indicated in **Figure 19** below the list of **policy indicators** created for that policy indicator framework will be displayed.
- Note that this is a read only view of the policies and the indicators. To create policy indicators, please refer to **step 2 in section 9.2.1.**

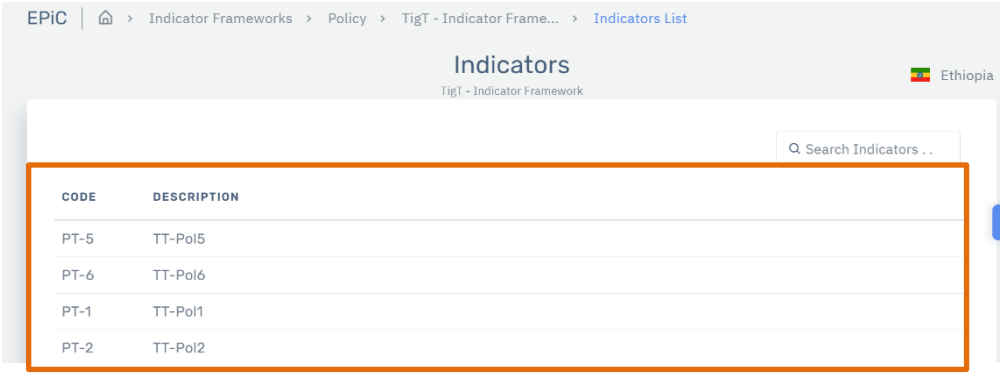


Figure 19: List of indicators created under an indicator framework

5.1. How to Create Indicator Framework

To create indicators, we need to have an indicator framework first, which can be created following the steps below.

Step 1. To create an indicator framework, choose either the Global or Regional or National from the Indicator Framework menu displayed in **Figure 14**.

Step 2. Depending on your selection, you will be redirected to the corresponding page with a **Create New** button at the top-right corner.

- ✓ The Create New button for **Global** and **Regional** indicator framework will only be visible to users who are assigned the **FRAMEWORK_MANAGER** role.
- ✓ The Create New button for **National** indicator framework will only be visible to users who are assigned the **NATIONAL_FRAMEWORK_MANAGER** role.

Step 3. As indicated in **Figure 20** below, the **Framework Type** field will be different based on what you selected. The Country field is only available when National framework type is selected.

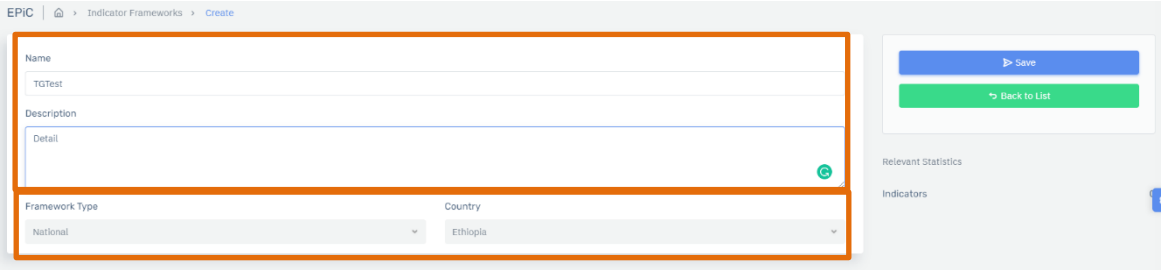


Figure 20: Creating an Indicator framework

Step 4. Please type in the Name and Description of the indicator framework you are creating and click **Save**.

Step 5. When the indicator framework is created it will be added to the list of indicator frameworks window.

Step 6. As indicated in **Figure 21** below, you can use the icons available to see the number of indicators associated with this framework, to download and import indicator (Refer to How to Download & Import templates), to edit the indicator framework and delete.

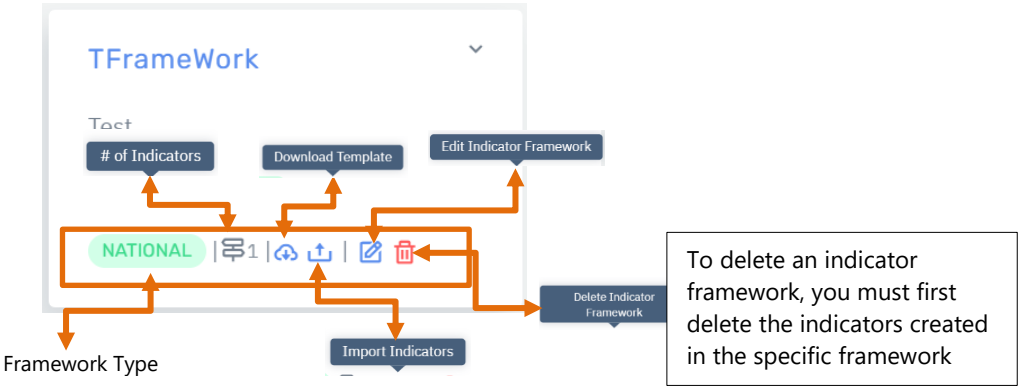


Figure 21: New framework created and adding indicators

5.2. How to Create Indicators

Once we have an indicator framework, we can create the indicators, following the steps below.

Step 1. To create an indicator, choose Global, Regional or National from **Figure 14** above.

Step 2. Depending on your selection, you will be redirected to a list of indicator frameworks as seen in **Figure 22** below. In this figure, we have chosen the National Indicator Framework

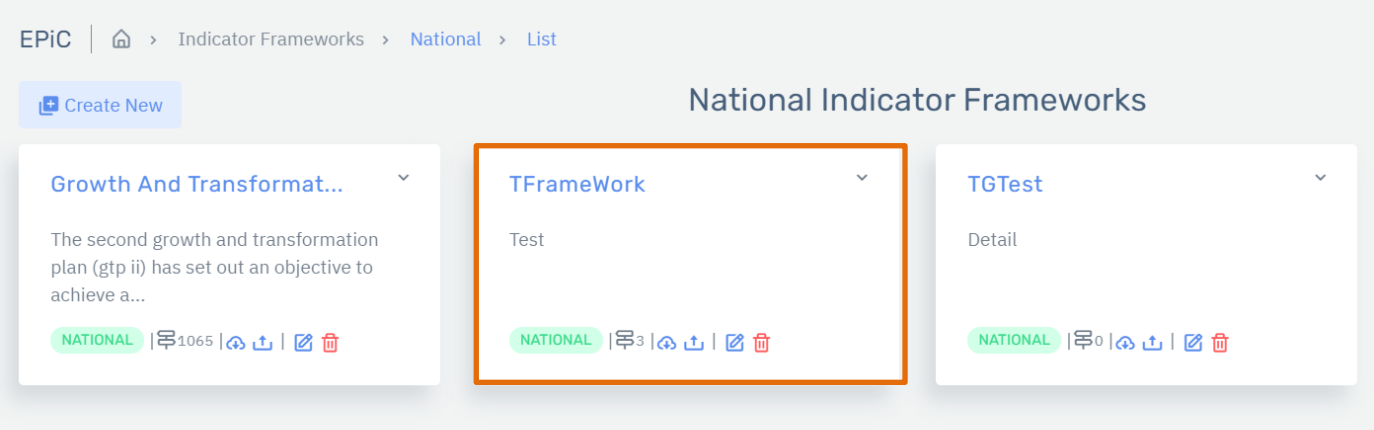


Figure 22: National Indicator Framework list

Step 3. From the available lists in **Figure 22** above, select one of the national indicator frameworks.

Step 4. You will be redirected to the Indicators list page for the selected indicator framework.

Step 5. As indicated in **Figure 23** below, you can manually add indicators in the system or download a template and import the indicators.

- ✓To download and import the indicators, please refer to How to Download & Import templates.

Step 6. To continue creating the indicator, click **Create New** button as indicated in **Figure 23** below

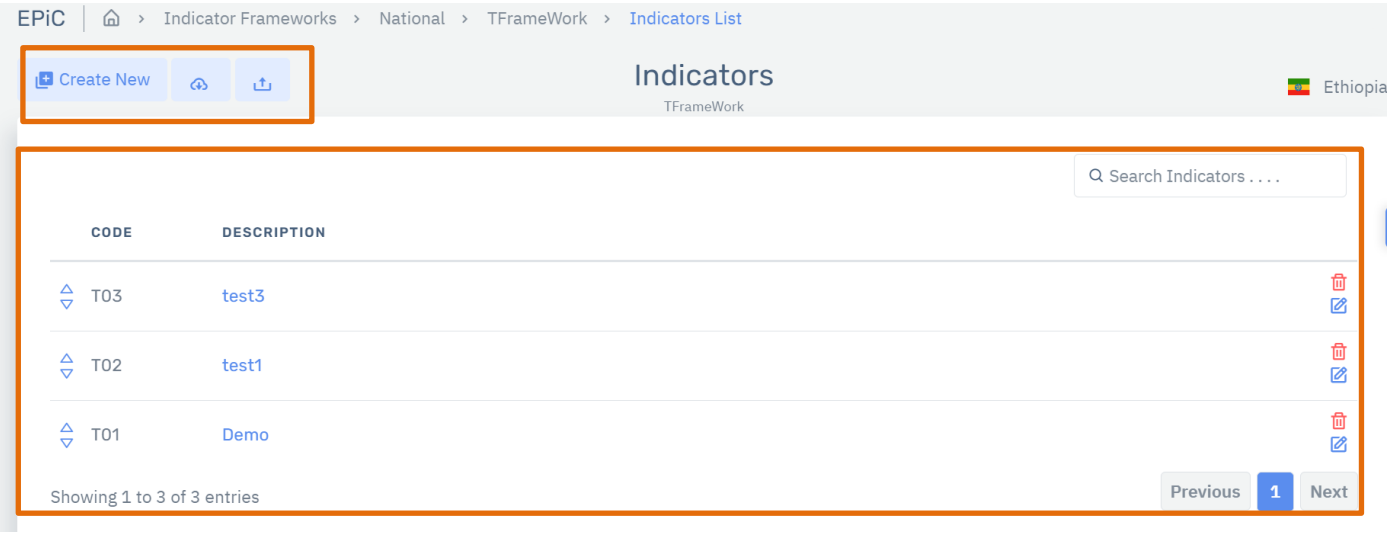


Figure 23: Indicators list for a specific indicator framework

Step 7. As indicated in **Figure 24** below, you will be redirected to the Create Indicator page.

Step 8. Type in the **Code** and **Name** of the indicator in the space provided and click **Save**

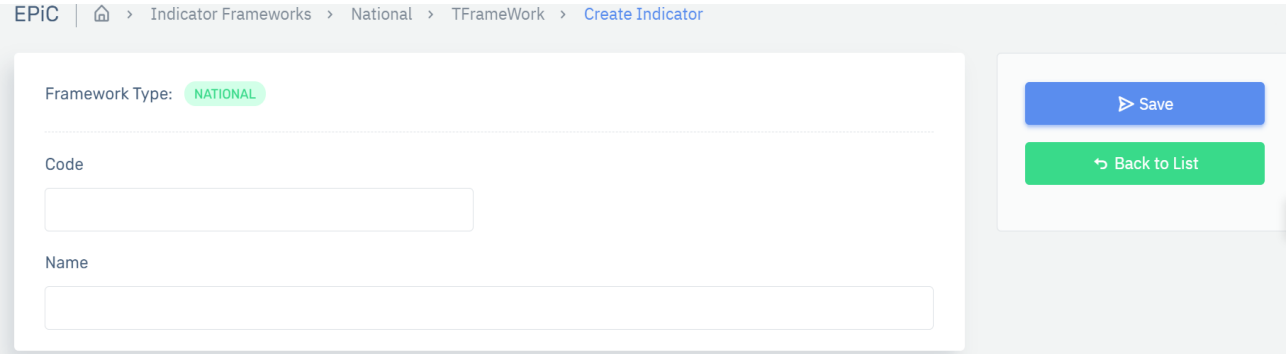


Figure 24: Creating an indicator

5.3. How to Download & Import Templates

5.3.1 How to download templates

Step 1. To download the indicator template, click the download template icon as shown in **Figure 25** below.

Step 2. When download template is selected an Excel document will be downloaded.

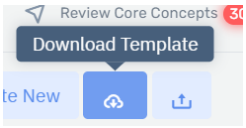


Figure 25: Downloading a template

Step 3. Once download is complete, please go to your download folder and open the template in an Excel file.

5.3.2 How to edit templates

Step 1. The downloaded Excel template should be opened as shown in **Figure 26**.

Note: *The Excel file is unique to each indicator framework or policy indicator that has been selected. Make sure to import the template to the relevant indicator framework.*

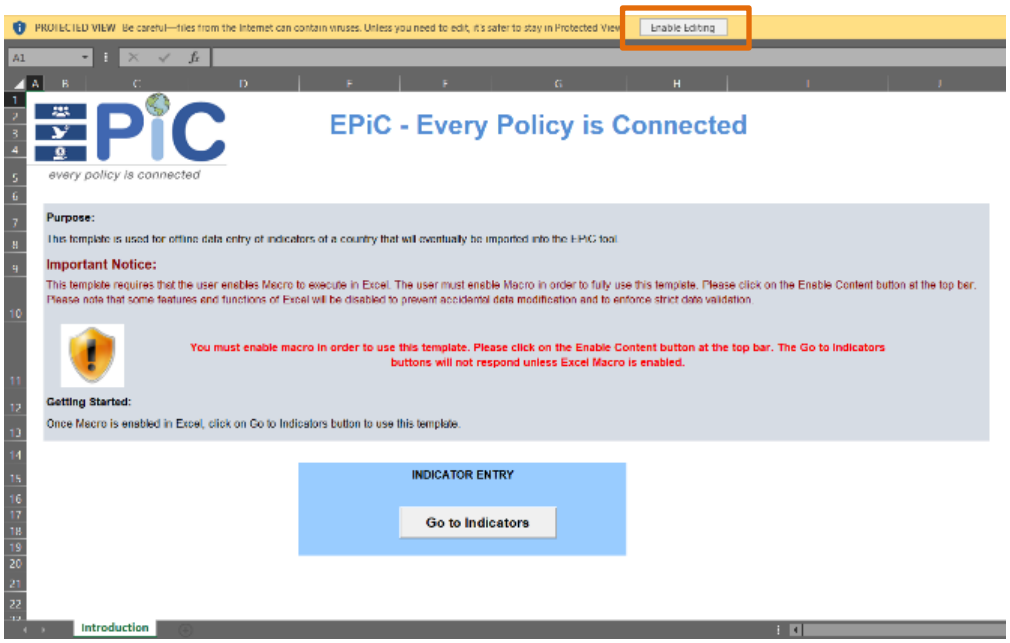


Figure 26: Excel file of the Indicator template when downloaded

Step 2. From **Figure 26** above click **Enable Editing.**

Step 3. When a security warning message pops up as indicated in **Figure 27** below, click **Enable Content** and then click **Go to Indicators** as shown.

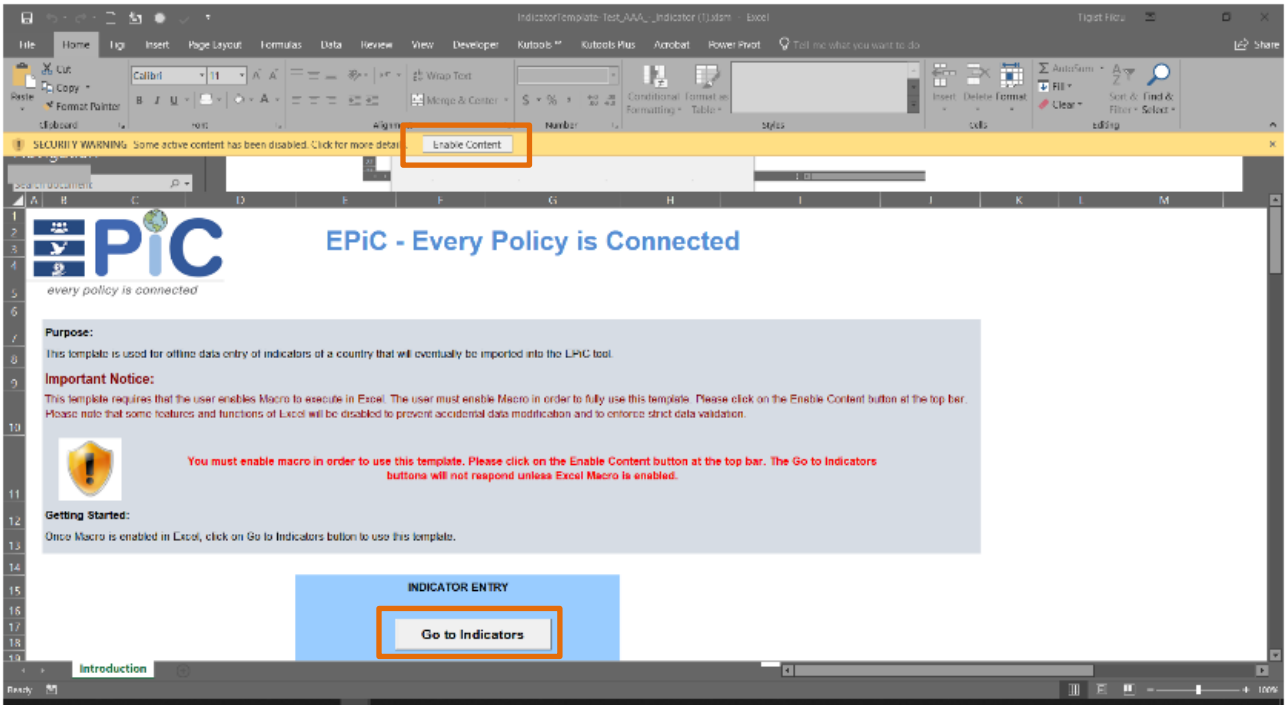


Figure 27: Enable Content and Go to Indicators

Step 4. You will be redirected to the Indicators Data Entry Excel sheet as shown in **Figure 28** below.

Step 5. In the appropriate columns, type in all relevant indicators and their details.

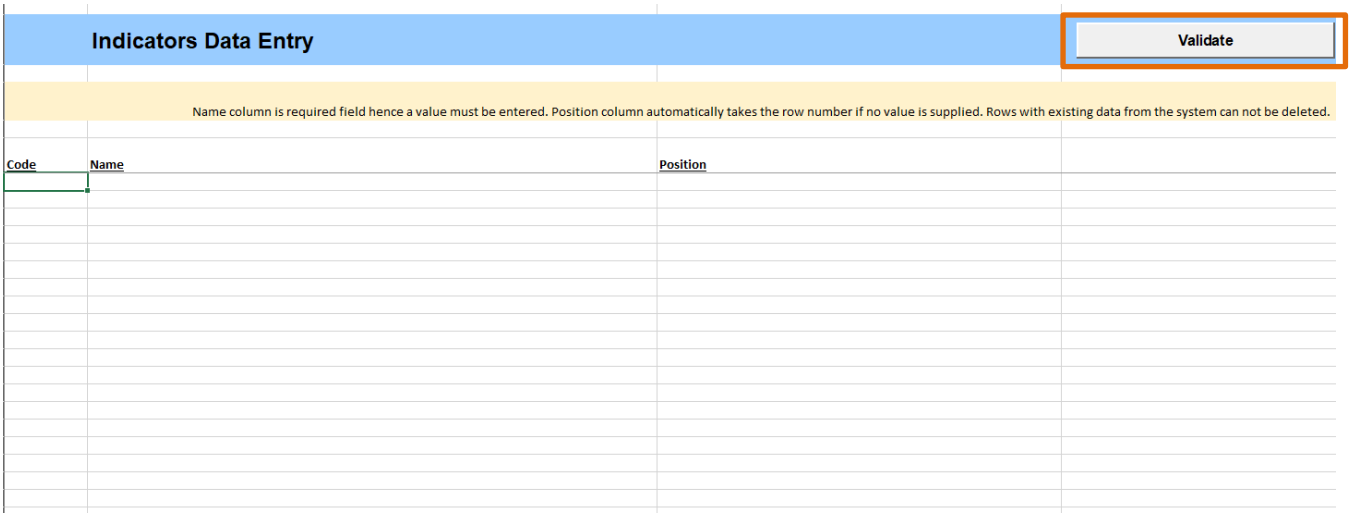


Figure 28: Indicators Data Entry Excel sheet

Step 6. After you have added the indicator click Validate as highlighted in **Figure 28** to make sure there are no errors and save the Excel file.

Step 7. You will be redirected to the General Excel sheet. You can see the confirmation that there are no errors. To add more indictors, select the Go to Indicators link.

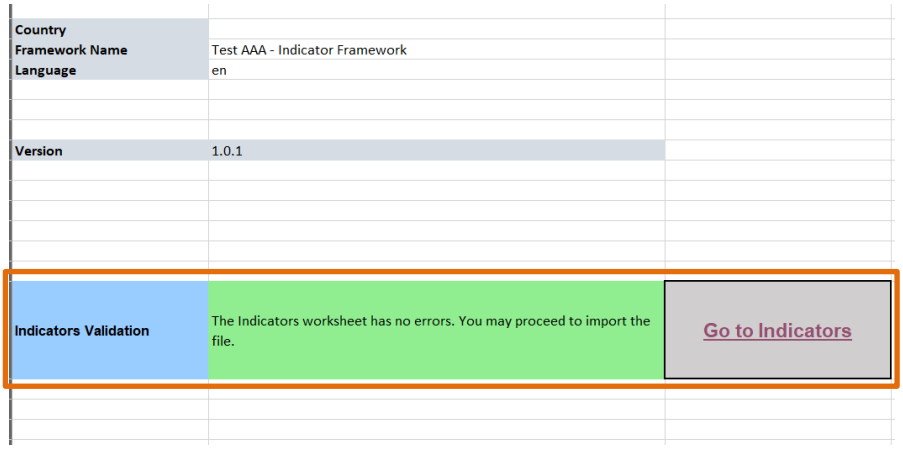


Figure 29: Confirmation the indicators are saved and validated

5.3.3 How to Import Templates

Step 1. To start the importing process, click **Import indicator** icon as indicted in **Figure 30** below.

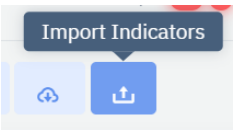


Figure 30: Importing a template

Step 2. As shown in **Figure 31** below the Import wizard will be opened. Click on Next to start importing.

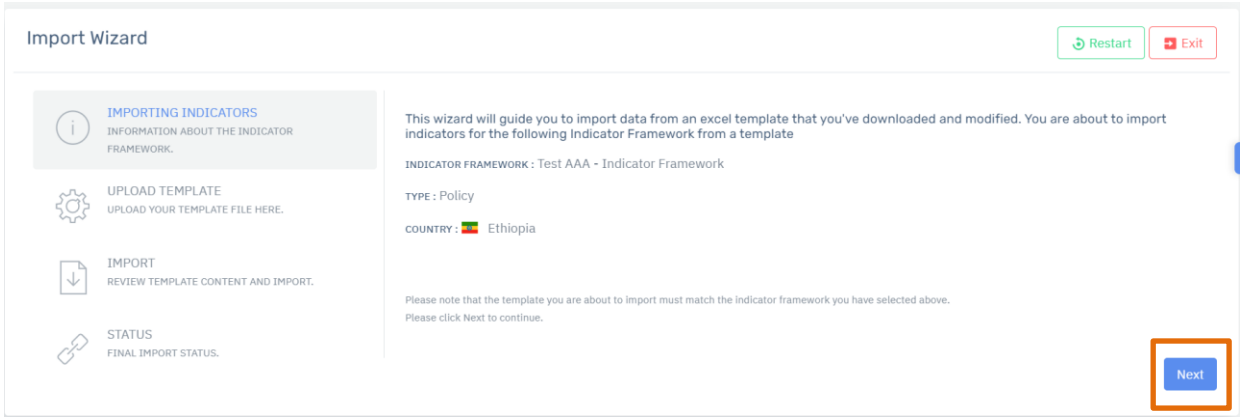


Figure 31: Importing Wizard window

Step 3. Browse and search for the indicator template Excel file to import the indicators.

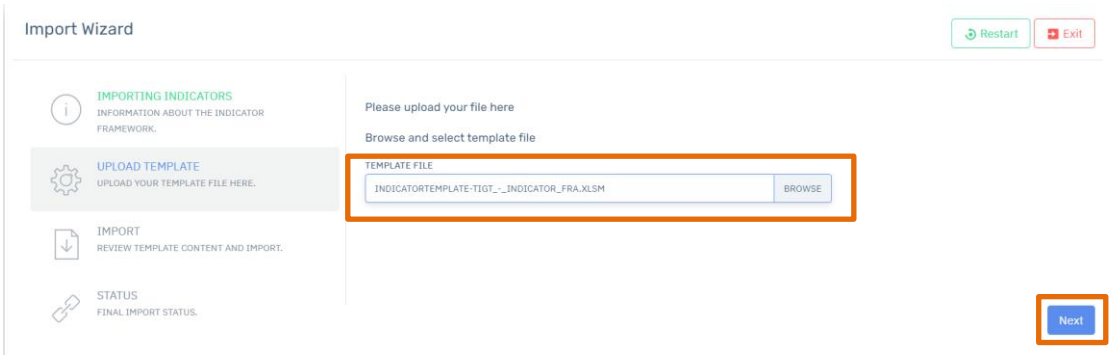


Figure 32: Uploading the indicator template

Step 4. When you upload and click next, a summary of the edited template content will be shown.

Step 5. Review the summary and click Next.

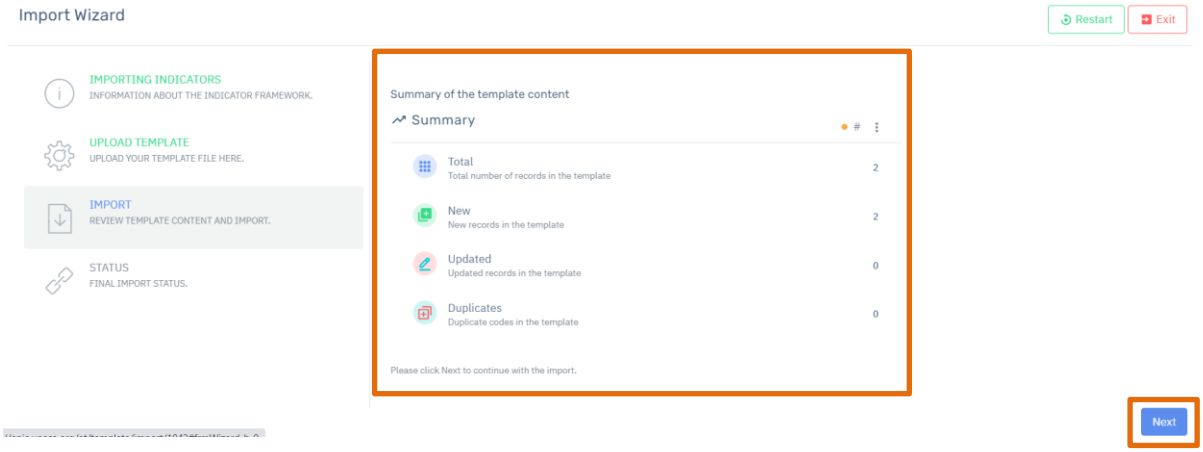


Figure 33: Summary of the template content

Step 6. If the import was successful with no errors a message will be displayed at the top as in **Figure 34**.

Step 7. Click Finish and close to finalize the import. The indicators will be added accordingly.

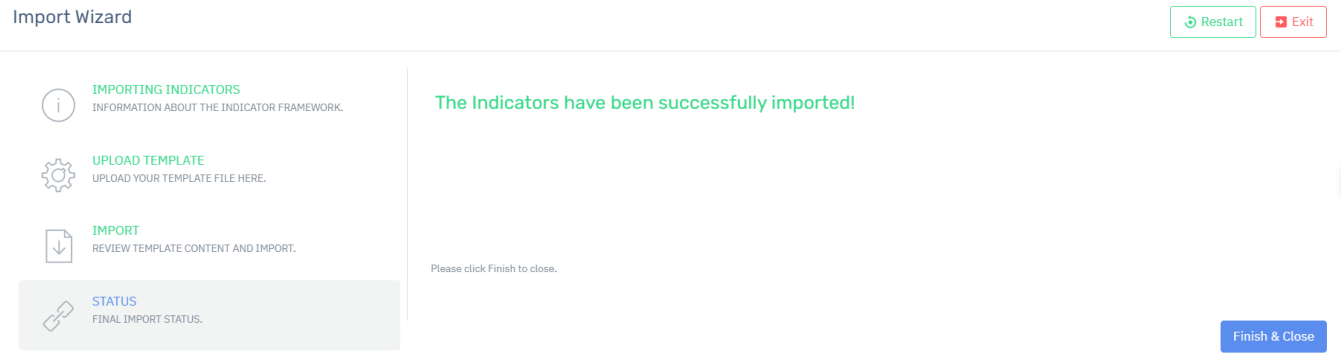


Figure 34: Indicator template imported

6. Core Concepts

Core concepts refer to the social, economic, environmental and institutional principles that guide national policy priority setting. There are 29 Global core concepts in the EPiC tool that all users can refer to.

- ✓ The Global Core Concepts are available for every country and they cannot be changed or edited.
- ✓ National Core Concepts can be created or edited by a user who has the role of National_Framework_Manager for the country.

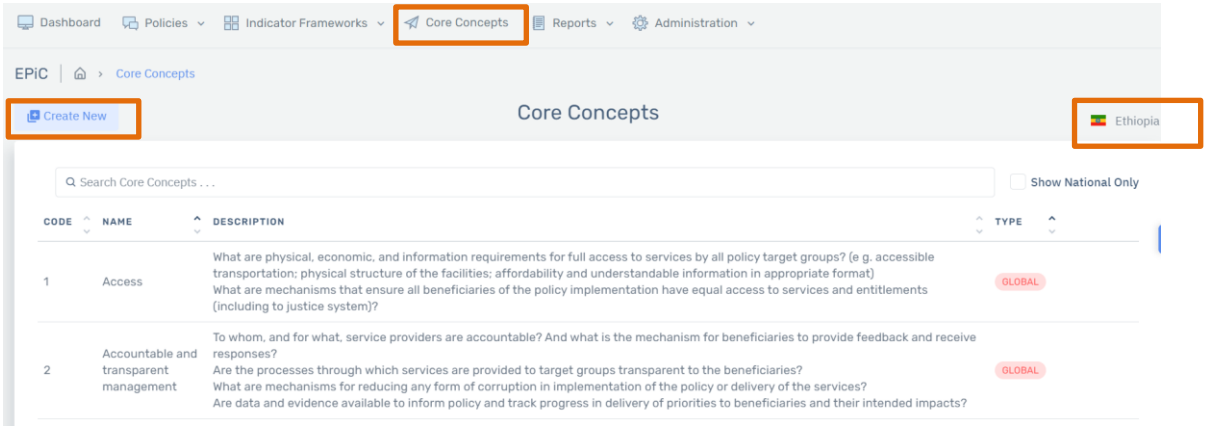


Figure 35: List of Global and National Core Concepts

6.1. How to Add National Core Concepts

Step 1. To add a national core concept, click **Core Concepts** menu as indicated in Figure 35 above.

Step 2. When the list of core concepts is displayed, click Create New button located at the top-left corner. This menu will only be visible to users with permission.

Step 3. You will be redirected to the Create New Core Concept window as indicated in Figure 36 below.

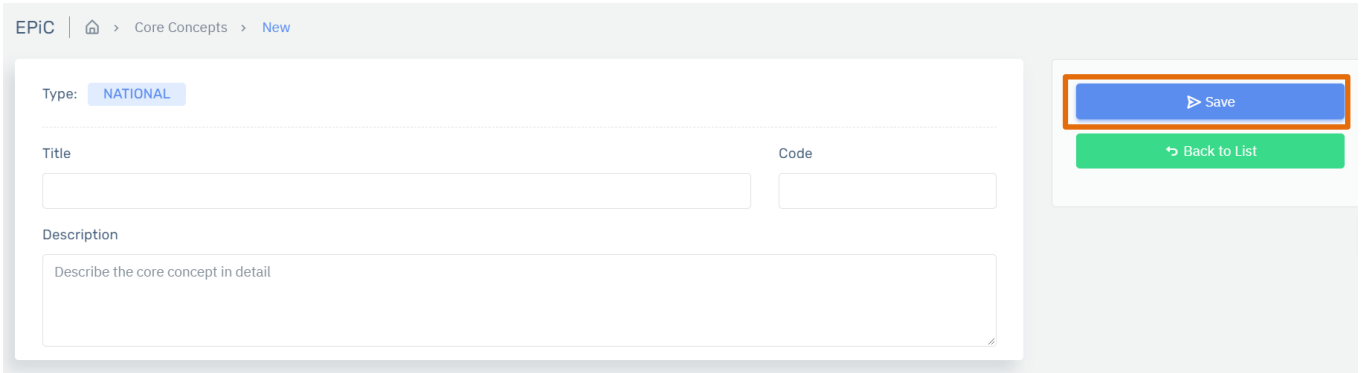


Figure 36: Creating a National Core Concept

Step 4. Please type in the Title, Code and Description of the Core Concept and click **Save**.

Step 5. The new Core Concept will be added to the list, which will be arranged according to the given code. You can click **Edit** icon to edit the Core Concept created.

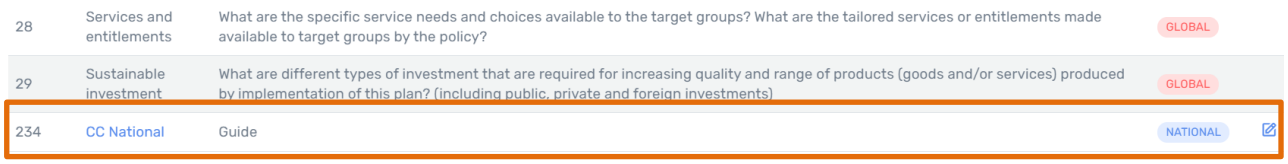


Figure 37: New national Core Concept added

7. Reports

Once the inputs have been added, you can create an overall **Progress Report** on all available policies from the **Reports** menu. You can also go to a particular policy and generate the reports by phases, with Phase IV report being the Final Report (Refer to Policy report in Sections 9.3 and 9.4).

7.1 How to Generate Progress Report

Step 1. To generate a progress report, click **Reports** then **Progress Report** as shown in **Figure 38** below.

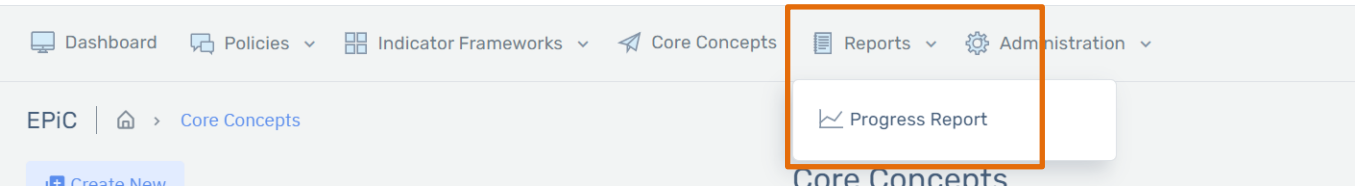


Figure 38: Creating an overall Progress Report

Step 2. When you click Progress Report you will be redirected to the Report that is divided into three sections, as seen in **Figure 39** below. You can Download, Print or Bookmark the report using action menus.

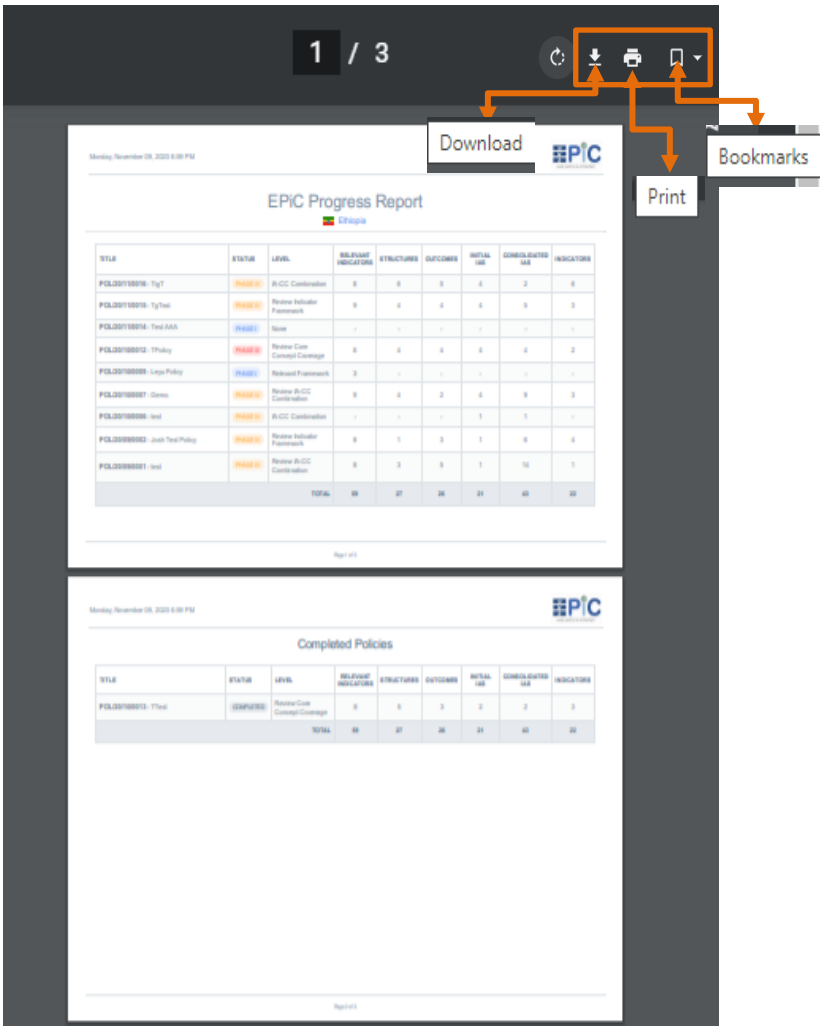


Figure 39: EPiC Progress Report

8. Administrations

Administration menu is only visible to users who have Administrator roles. The Administrator can go to **Users & Roles** or **Countries**.

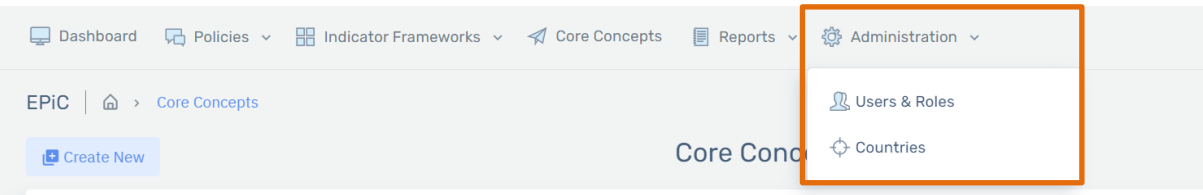


Figure 40: Administration sub-menus

8.1. Users & Roles

From the Users & Roles menu, the administrator can create new users and assign roles as appropriate.

Step 1. When Users & Roles is clicked, you will be redirected to the User's List as indicated in Figure 41 below.

Step 2. The Administrator can see all users who currently have access to the system. The Administrator can also add a new user by clicking the **Create New User** button.

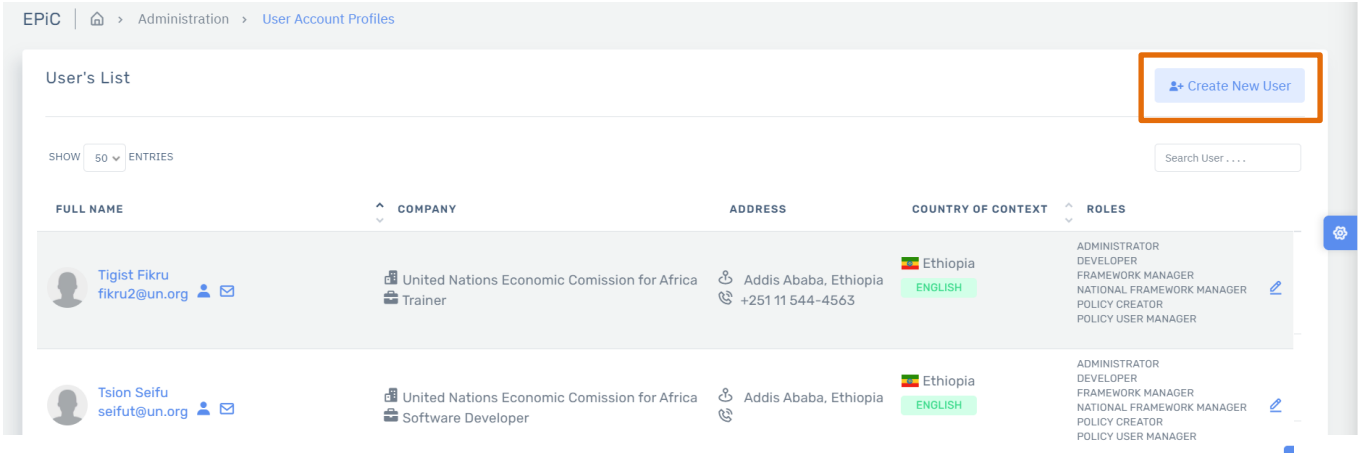


Figure 41: User's List

Step 3. When the Create New User is clicked, you will be redirected to the Create Profile page as in Figure 42.

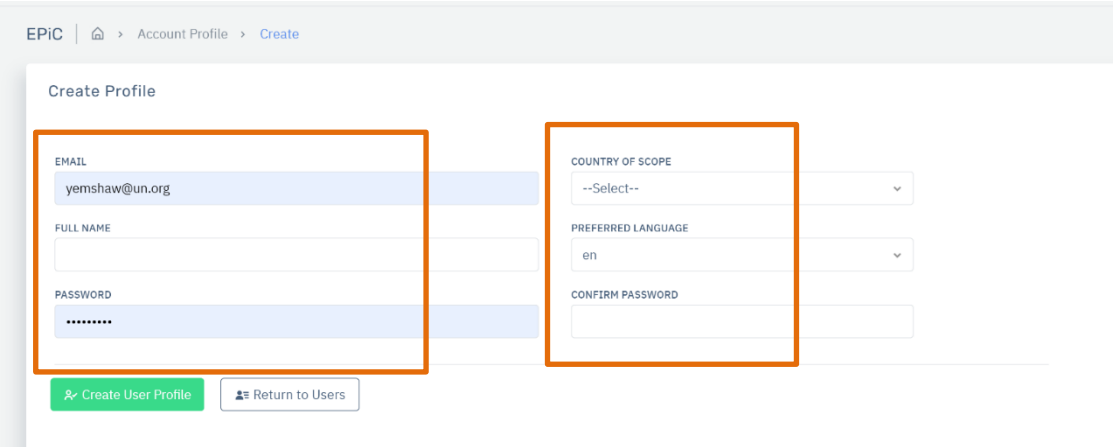


Figure 42: Creating a new user

Step 4. In the Create Profile page, provide the new user's detail. You can also set the Country of Scope the user is allowed to view.

Step 5. To edit user's information, please click the name of the user from the screen shown in **Figure 41** above.

Step 6. From the Basic Details page for the selected user, you can reset password, lock user, edit profile settings or delete user as shown in **Figure 43**.

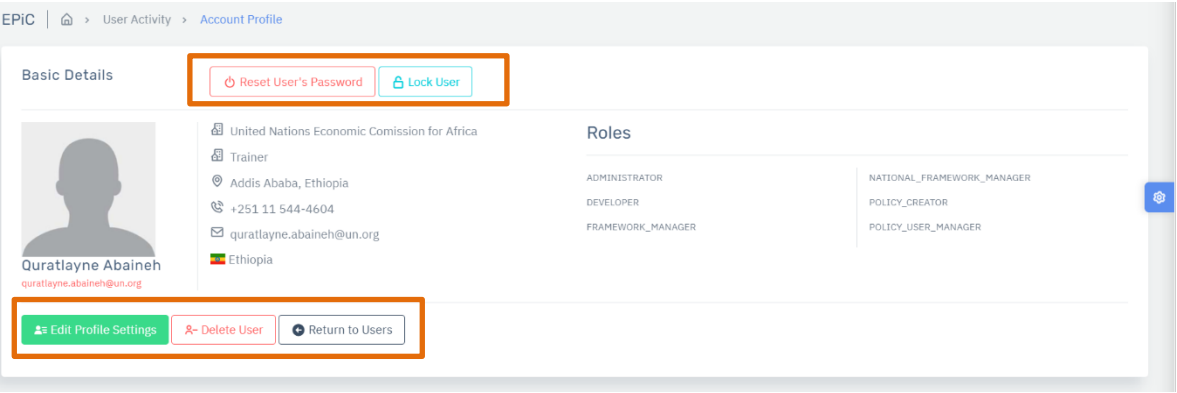


Figure 43: User's Basic Details page

Step 7. To set and/or change access level for the Country of Scope and assign roles to the user, click **Edit Profile Settings**. You will be redirected to the Edit profile page displayed in **Figure 44** below.

- ✓ Country of Scope sets the country which the user is allowed to access and can view the list of policies, the national and policy indicator frameworks and generate reports. The user cannot be assigned to more than one country of scope

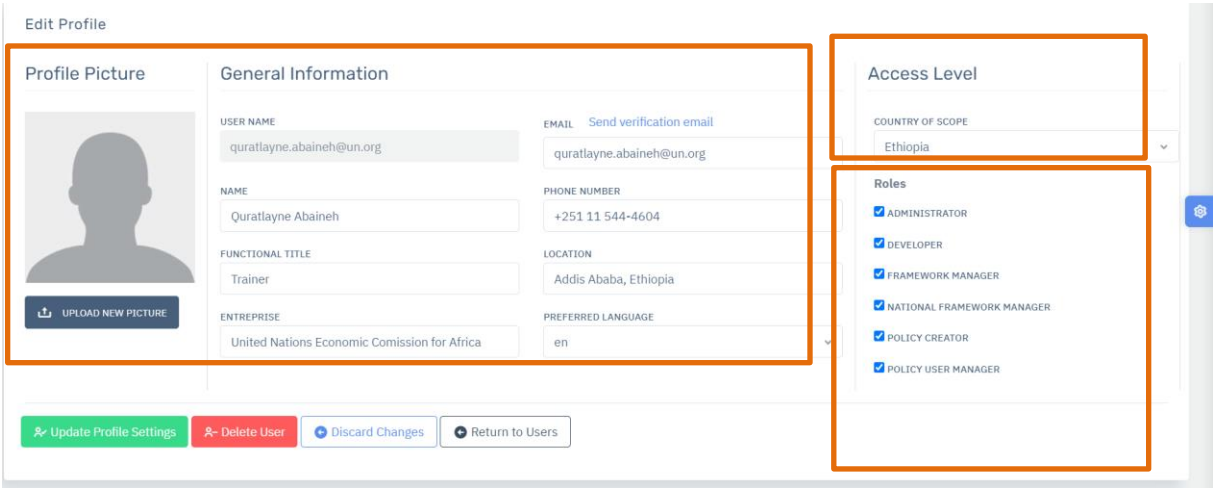


Figure 44: Administrator - Edit Profile Settings

8.2. Countries

From the Countries menu, the Administrator can view and change the context of the country information being shown. The Administrator can also view which users with access to the country.

- ✓ A user with the administrator role can change the country of scope from here and view the details within that country of context.
- ✓ The four icons available at the last column gives the administrator differnet options to directly go to the countries specific view as indicated in the figure.

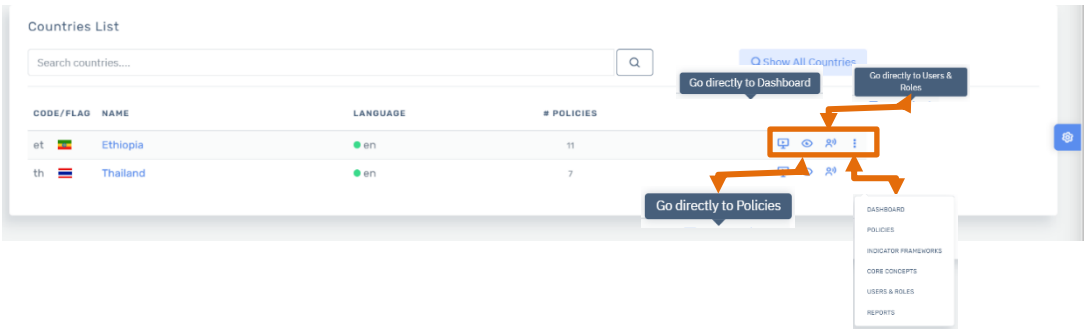


Figure 45: List of countries visible to the Administrator

9. Policies

From the Policies menu, a policy can be added to the system. After the policy is created, it goes through four phases. Only users assigned to the phase will have access to the edit functions within the corresponding phase.

9.1. Accessing a Policy

Step 1. From the top menu bar, select the **Policies** drop-down and click **All**, as indicated in the **Figure 46** below. From the sub menu, you can select a phase to view the policies in the corresponding phase (click Phase I to view all policies in Phase I).

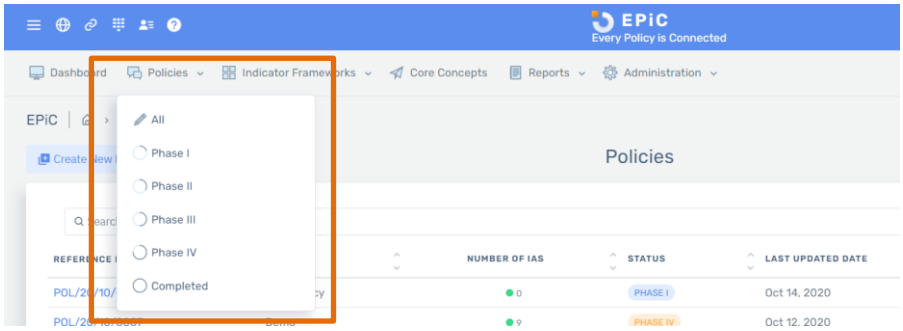


Figure 46: Policies menu

Step 2. Selecting **All** from the drop-down list, you will be redirected to the policies page displayed in **Figure 47** below. The page shows a list of all policies for the country of context and their status. Instructions on creating new policies can be found in How to start analyzing a new policy.

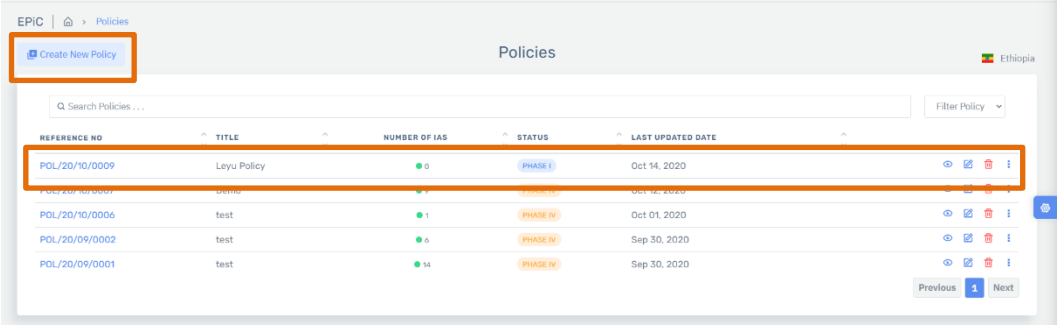


Figure 47: The Create New Policy button

Step 3. If you select and open one of the policies, you will be redirected to **Figure 48** below.

Figure 48: Main sections view of a policy at each phase

Section 9.1. This section allows the user to navigate between the four phases within the policy. You can go to a previous policy to view and read the details.

✓ As indicated in **Figure 49** below, the arrows allow you to either move to the next or previous phase depending on which phase you are at.

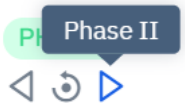


Figure 49: Changing policy phase to review

✓ When the phase name is displayed **green**, the policy you are viewing is synced to the actual phase. If the phase is in **red**, you are viewing other phases of the policy, and not the actual phase it is currently set at.

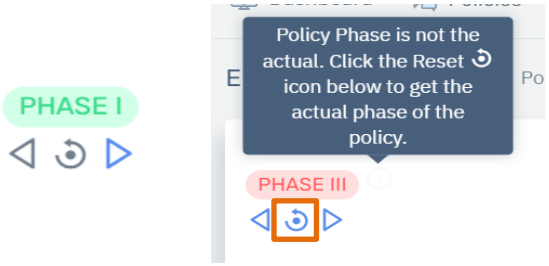


Figure 50: Phase names coloring description

✓ As indicated in **Figure 50** above, you can click the reset icon any time to return to the actual phase of the policy

Section 9.2. This section shows the particular policy reference number and policy title.

Section 9.3. This section shows which the country of scope you are currently viewing and its details.

✓ The help icon below the country name is available at each stage of the phases.

✓ When you click the help icon, it displays a window with details of steps you will be undertaking at the corresponding phase.

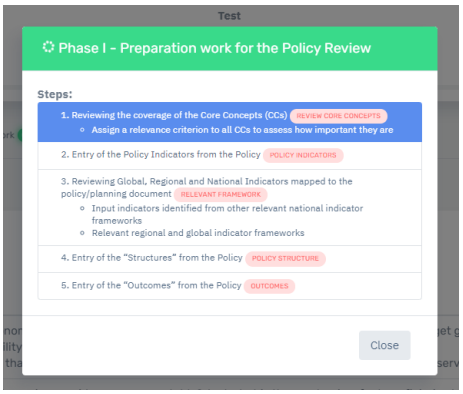


Figure 51: Help icon available at each phase

Section 9.4. This section indicates the overall progress of the completed steps in the policy.

Section 9.5. This section will display quick icons of the sub-menus associated with the phases that allow users to move from one step to the next

9.2. How to start analyzing a new policy

Step 1. To initiate applying EPiC on a new policy, click **Create New Policy** menu from the policies page. Note that the Create New policy menu is only available to users with authorization.

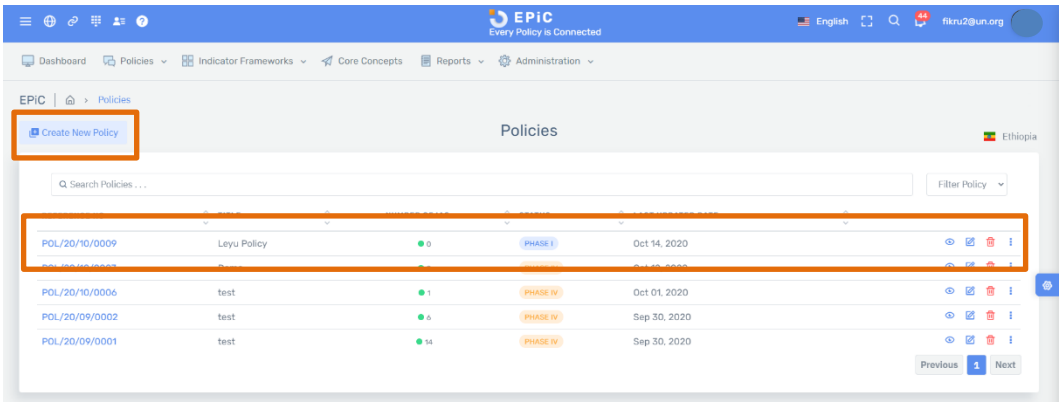


Figure 52: The Create New Policy button

Step 2. You will be redirected to the create policy page as indicated in **Figure 53** below. Please type in the **Title** and **Description** of the policy in the space provided click **Save.**

Step 3. Once a policy is created and saved, you will be redirected to **Figure 54** below.

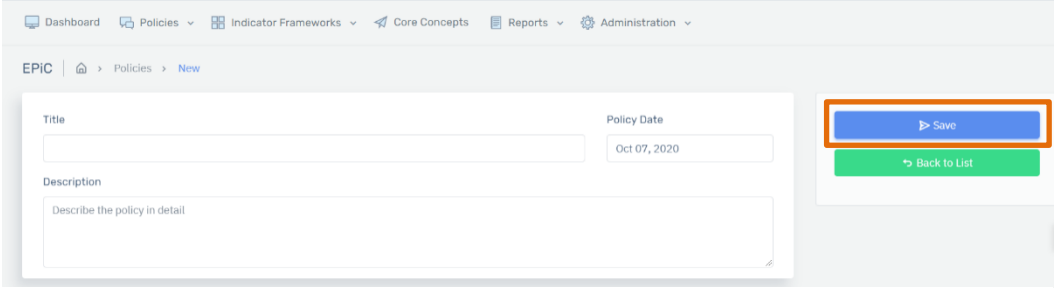


Figure 53: Creating a new policy to be analyzed

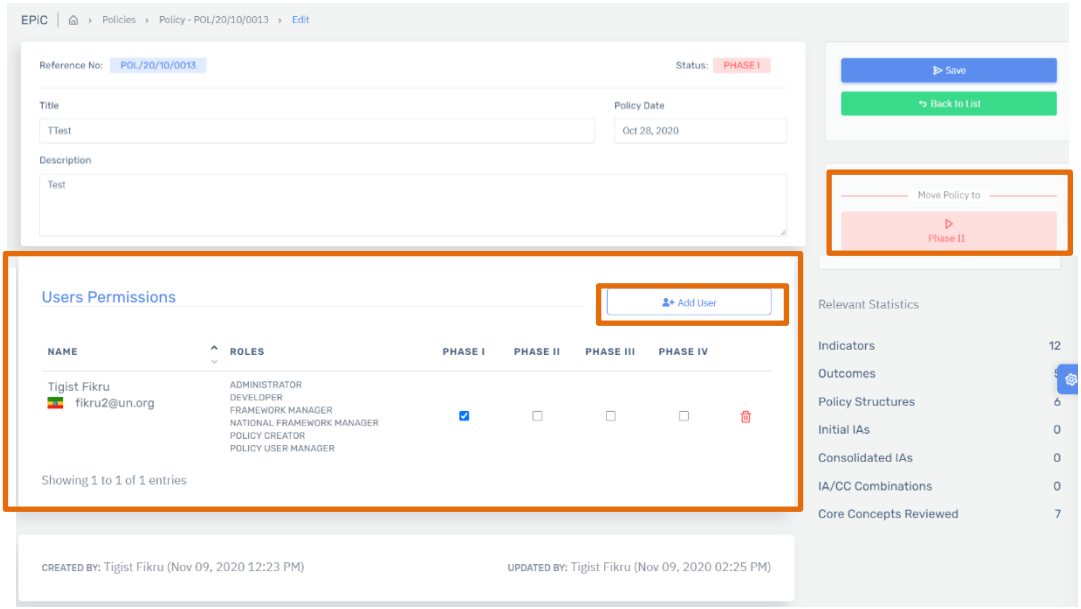


Figure 54: Detail view of newly created policy

Step 4. As indicated in **Figure 54** above you can complete different actions detailed below.

- ✓ You have the option to move the phases of the policy.
- ✓ At the bottom section, you can view the users who are given permission to work on each phase. Users assigned the **Policy_User_ Manager** or **Administrator** role can give permissions to other users to work at specific phases by clicking **Add User**.

Step 5. When you have completed the actions, click **Save** to continue.

Step 6. A new policy will be added to the policies list as indicated in **Figure 55** below.

Step 7. As indicated in **Figure 55**, there are edit options for each of the listed policies at the end of the column.

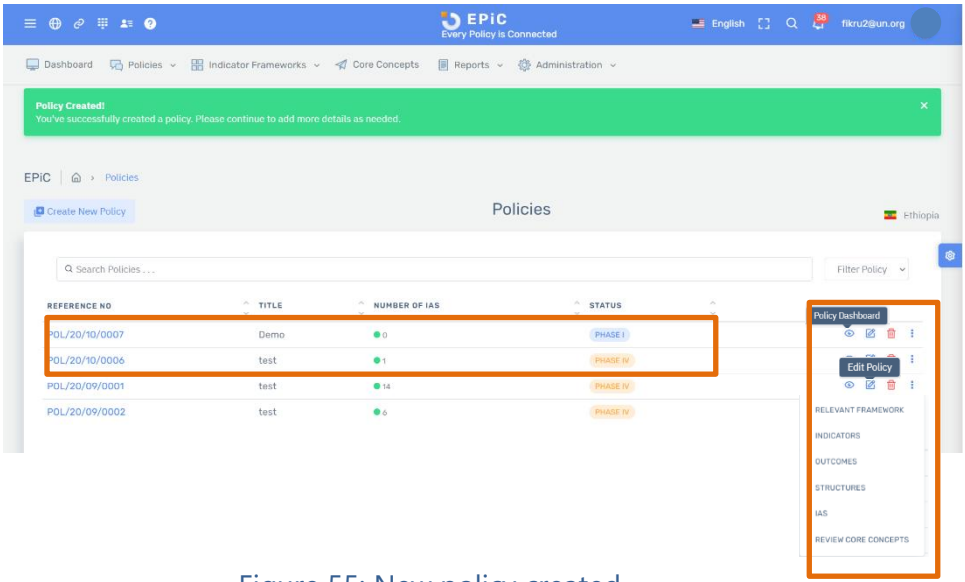


Figure 55: New policy created

Step 8. You can view the policy dashboard, edit or delete the policy. You can also view relevant Indicators, outcomes, structures and IAs by clicking on the vertical ellipsis icon on the right side of the screen.

Step 9. To start working on the policy you created, click on the reference number to open and see the details.

Step 10. Every new policy will start at **phase I**. The phases every policy go through and each associated steps.

9.2.1 Policy Overview and Dashboard

Step 1. At every phase of a policy, users can view/open the policy overview and the dashboard pages.

Step 2. As indicated in **Figure 56** below, users can access the policy overview on the left side of the menu.

Step 3. When the dropdown icon is clicked it will display menus for the policy overview and the dashboard of four phases.

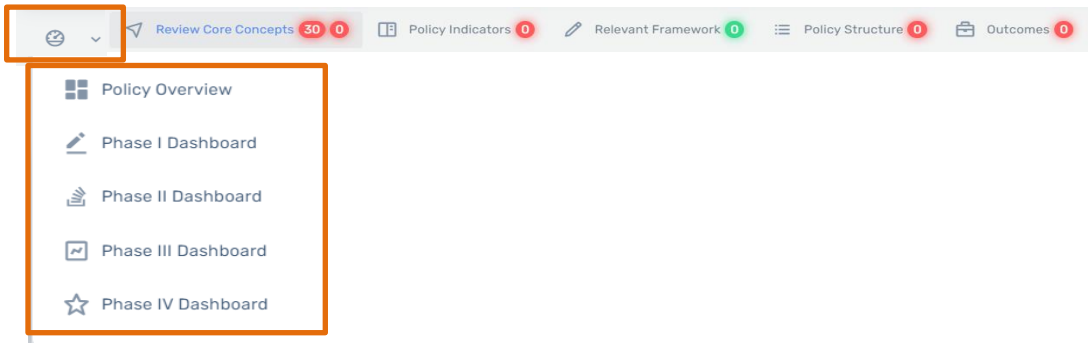


Figure 56: Accessing the policy overview and dashboard pages

Step 4. When the policy overview is clicked, it will open the detailed overview of a specific policy

Step 5. If you open any of the four phase dashboards, a summarized graphical representation will be shown for the completed steps in that specific phase. **Figure 57** below shows an example of what the phase dashboards will look depending on the phase selected.

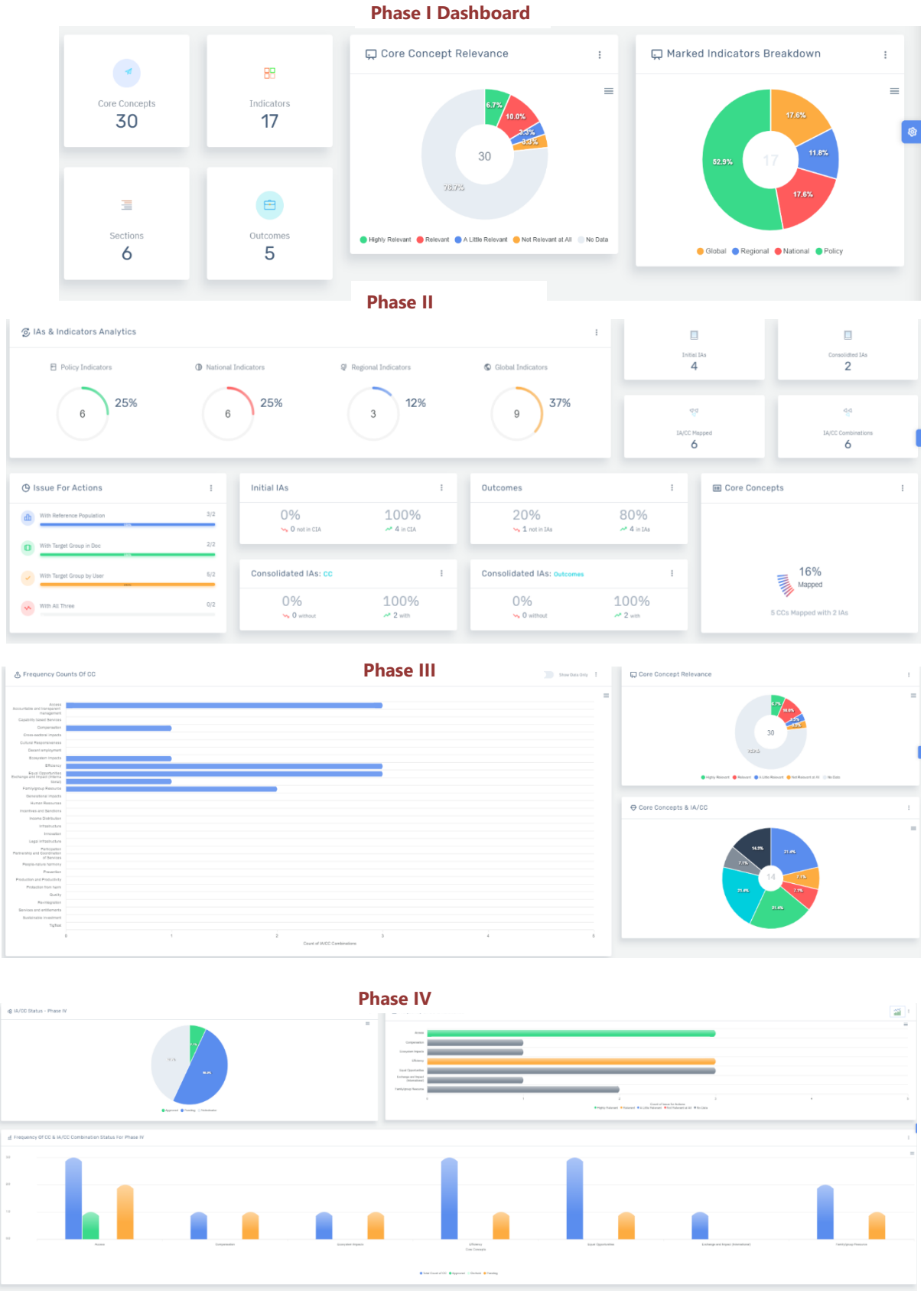


Figure 57: The dashboard pages for each of the four phases

9.2.2 Phase I: Preparation work for the Policy Review

The first phase of the EPiC tool focuses on understanding the policy/planning document and identifying relevant components to be entered into the system, such as sections and sub-sections, indicator framework and outcomes. Other information include relevant Global, Regional and National indicator frameworks. This phase also requires a review of Core Concepts.

Step 1: Review Core Concepts

Here you will assign relevance criterion to all the Core Concepts in the EPiC tool to assess how important they are to the planning/policy document. A universal list of Core Concepts will be available for all users, and users may also add their own Core Concepts to best reflect the country context. Follow the steps detailed below to review the core concepts.

Important: Users are required to use key questions associated to each CC and discuss in group to fully understand the purpose of each CC prior to assigning relevance to them.

Step 1. To start, click **Edit CC Relevance** to review and select the relevance.

Step 2. From the list of core concepts, assign one of the four categories from the drop-down to each Core Concept (**Highly relevant**, **Relevant**, **A little relevant**, **Not relevant at all**) as in Figure 58 below.

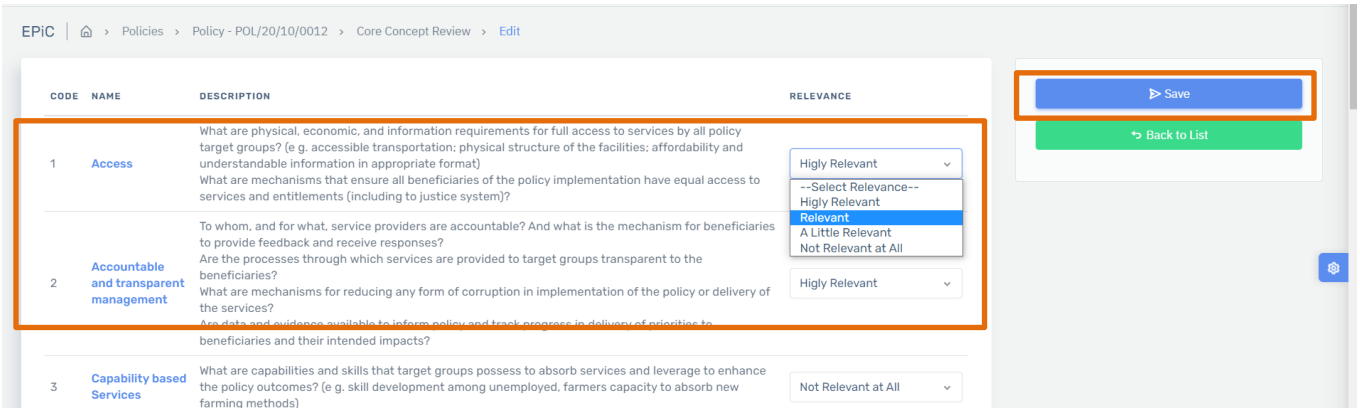


Figure 58: Phase I - Assigning relevance of CC with respect to the policy

Step 3. After assigning relevance, click **Save** on the right side of the window.

Step 4. A confirmation message will be displayed at the top of your screen.

Step 5. As indicated in Figure 59 below, a selected relevance level will be displayed with each core concept.

Step 6. The number of core concepts with and without an assigned relevance value will be displayed and updated on the panel. For instance, in Figure 59, 7 core concepts out of 30 have been reviewed.

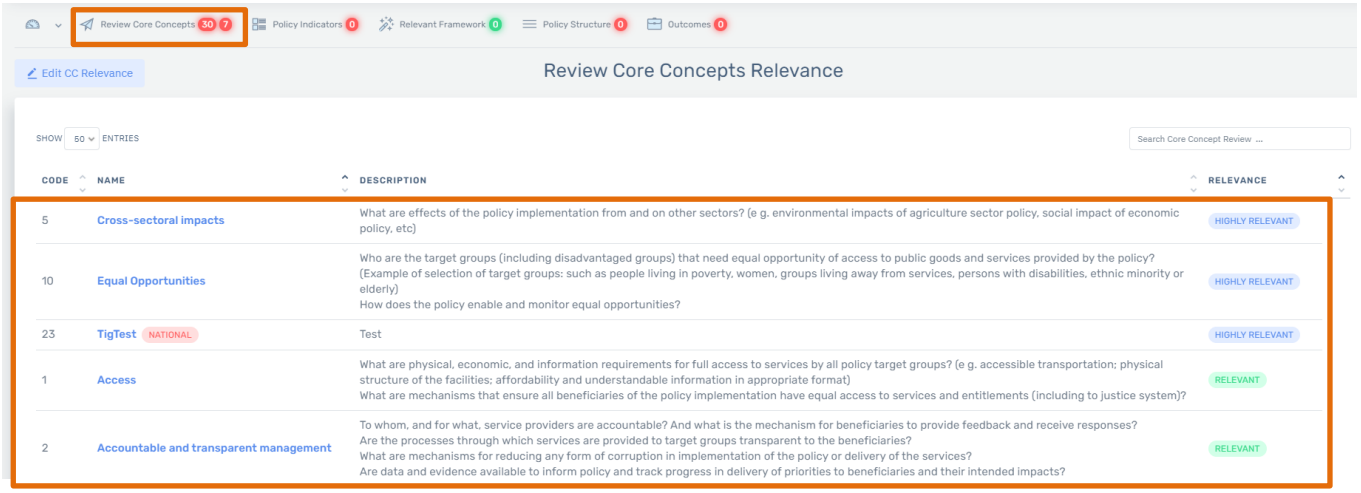


Figure 59: Phase I - Relevance assigned to core concepts

Step 2: Policy Indicators

At this step the user can insert relevant policy indicators. Policy indicators are often provided in outcome table or as a separate table in the annex of the policy document. The best place to find policy indicators is the monitoring and evaluation (M&E) framework associated to the policy.

Step 1. To insert policy indicators in the policy, click **Policy Indicator** from the menus under Phase I as indicated in **Figure 60** below.

Step 2. Policy indicators can be manually added in this window or you can download and import indicators using a template. (Refer to: How to download & Import templates).

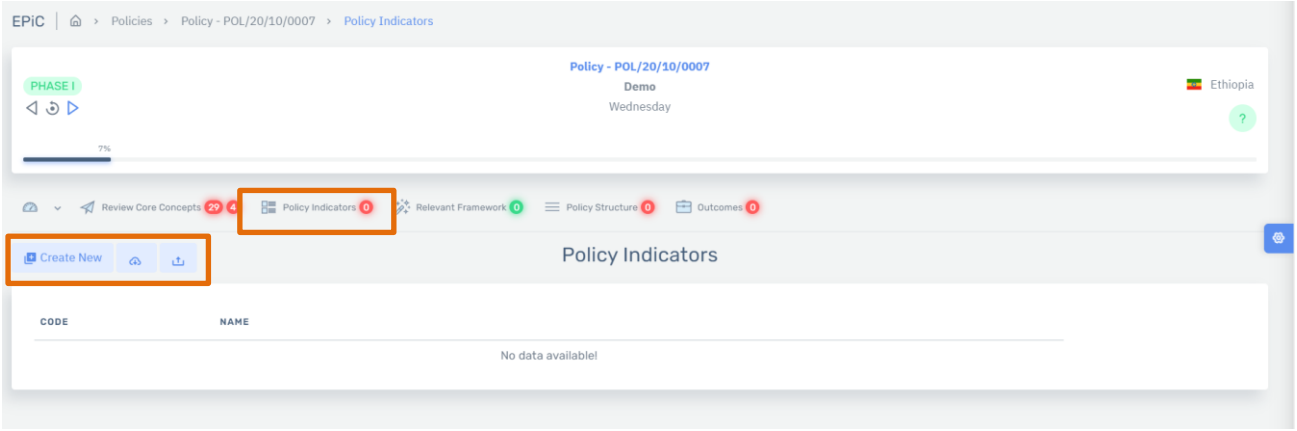


Figure 60: Policy Indicator Window

Step 3. As indicated in **Figure 60** above, **Create New** button will redirect users to **Figure 61** below.

Step 4. As required, type in the **Code** and **Name** of the policy indicator in the space provided.

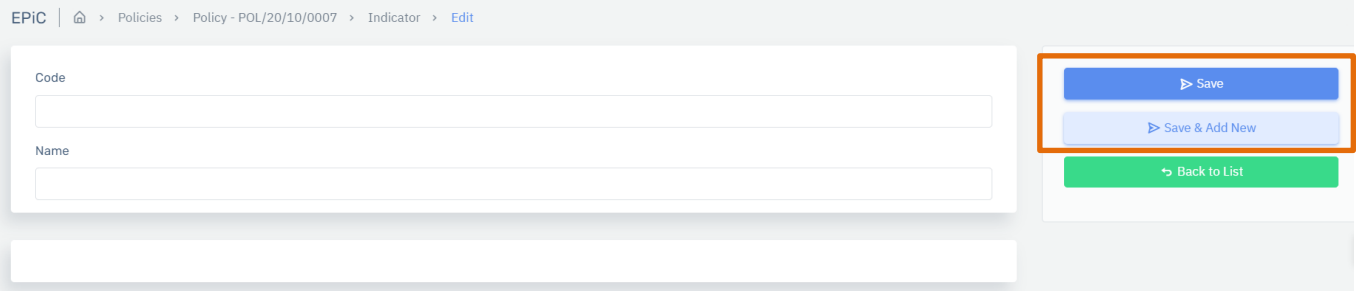


Figure 61: Phase I – Creating a *policy* Indicator

Step 5. After filling in the fields, choose **Save** or **Save & Add New** to add more policy indicators.

Step 6. When you have added all policy indicators, they will be displayed as a list view. From the icons available next to each indicator, you can choose to Edit or Delete.

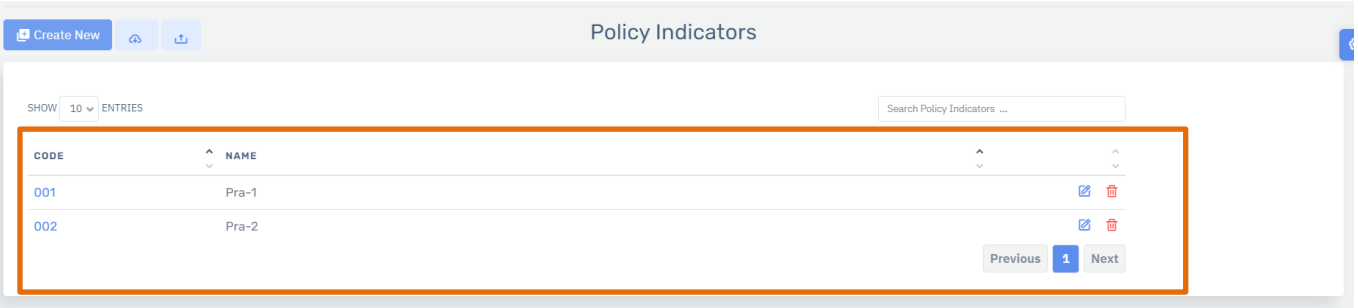


Figure 62: List of policy indicators created

Step 3: Relevant Indicator Framework

At this step, users can add relevant Global, Regional, and National indicator frameworks to the policy. As with the Core Concept, universally applicable indicator frameworks like the Sustainable Development Goals will be available to all users, and users may add other relevant frameworks.

Step 1. To add relevant frameworks, click the **Relevant Framework** menu as indicated in **Figure 63** below.

Step 2. Click the **Add Relevant Indicators** button, which will redirect users to **Figure 64** to add Global, Regional and National frameworks.

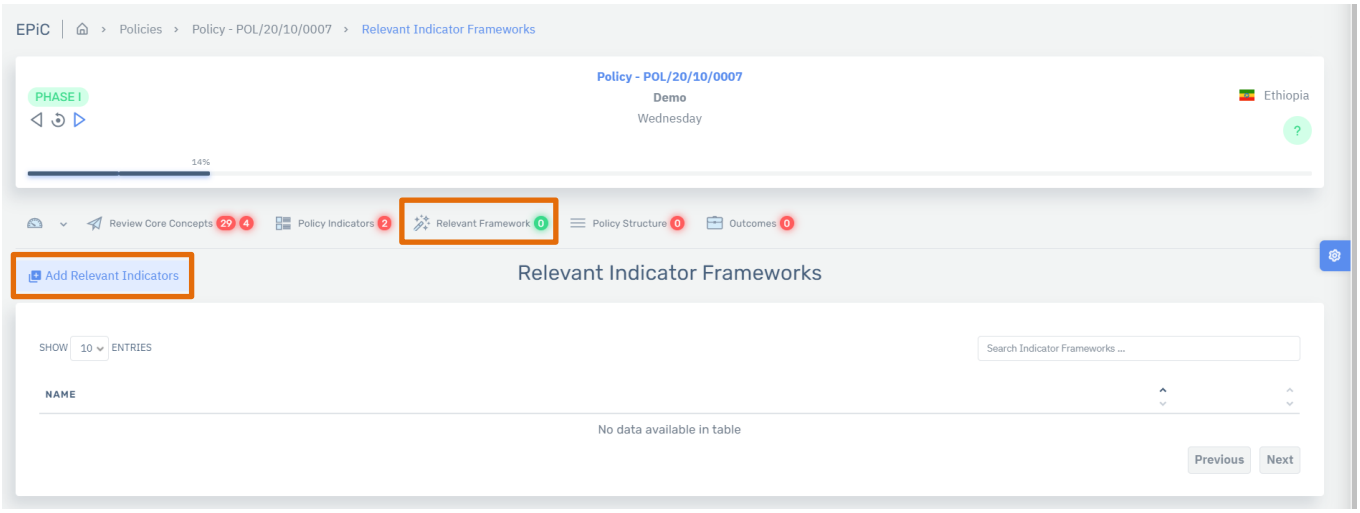


Figure 63: Relevant Indicator Frameworks window

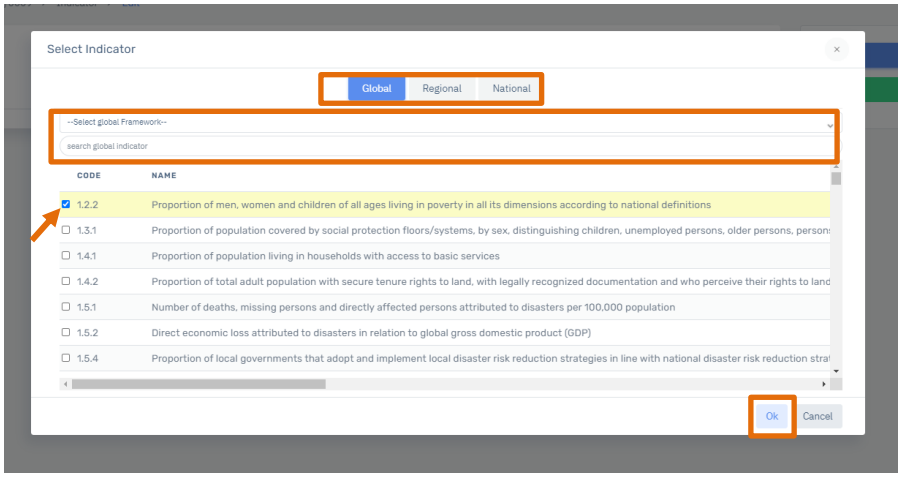


Figure 64: Adding Relevant Indicator Framework

Step 3. You can choose to add a combination of frameworks by clicking the Global, Regional, and National menus one by one and selecting check box next to the indicator code under each framework. Users can also search relevant indicators by typing keywords of indicator descriptions.

Step 4. After selecting all relevant indicators, please click the **OK** button.

Step 5. The selected indicators will be displayed as shown in **Figure 65** below. To save and continue to the next step, click **Save**.

Step 6. To add more indicators, click **Add Indicator** at the top-right corner as indicated in the figure below.

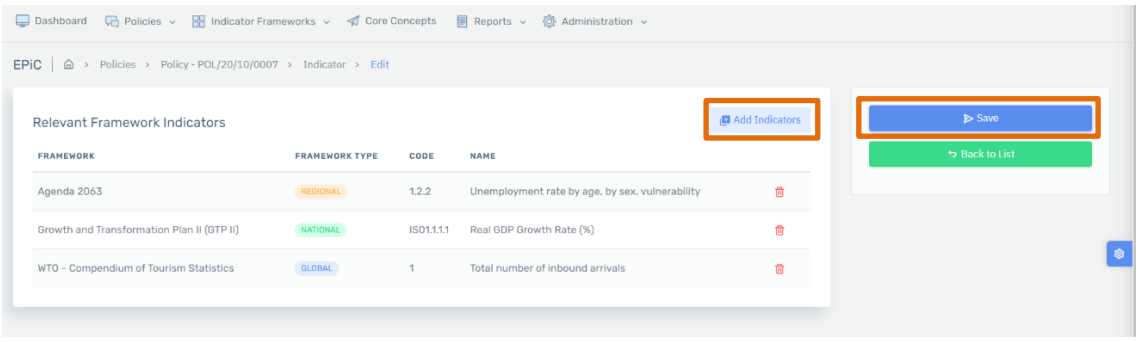


Figure 65: Newly added relevant indicator frameworks

Step 7. After adding and saving all the relevant indicators as shown in **Figure 66** below, indicators will be listed, based on their indicator framework category (i.e., Global, Regional or National).

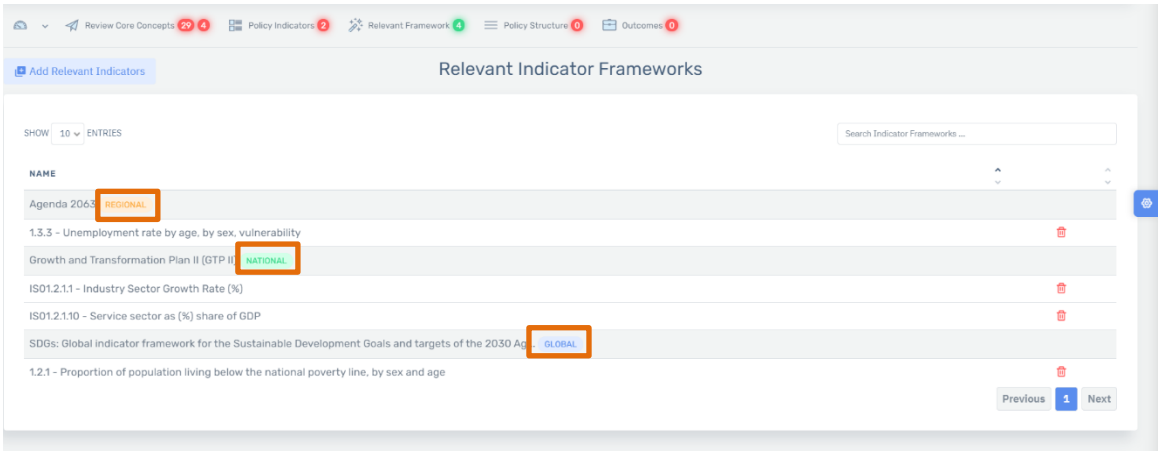


Figure 66: List of all relevant indicator frameworks added

Step 4: Policy Structure

At this step the user may add a policy structure to trace the sources of policy information in the document. The policy structure can contain just sections or could be more detailed and consist of both sections and sub-sections. These navigational guides can help users to match entries in the EPiC tool to the original policy document and closely assess the overall policy.

Step 1. To create the policy structure, click **Policy Structure** menu under Phase I as indicted in **Figure 67** below. Then click **Create New** button, which will redirect users to **Figure 68**.

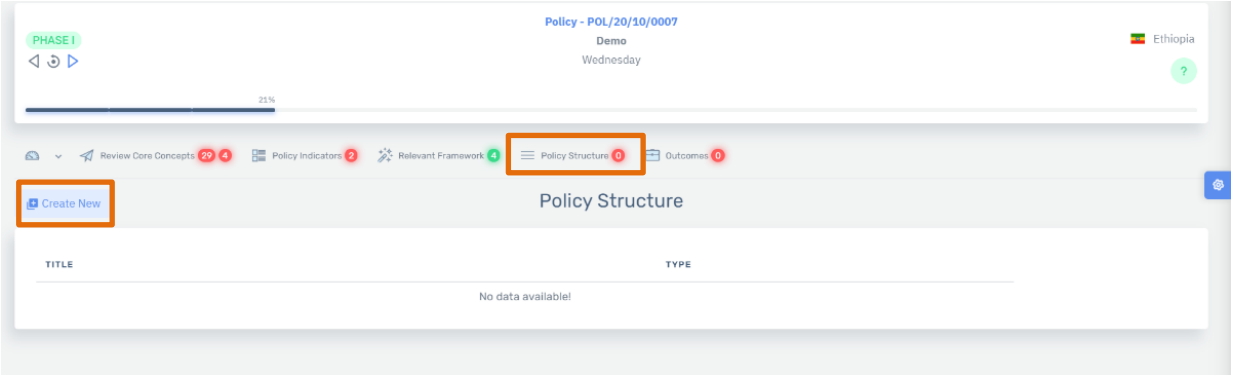


Figure 67: Policy Structure window

Step 2. As shown in **Figure 68**, users are required to define the input as either a section or sub section and type in the **Title.** To add a sub-section to the policy structure, you first need to create the section.

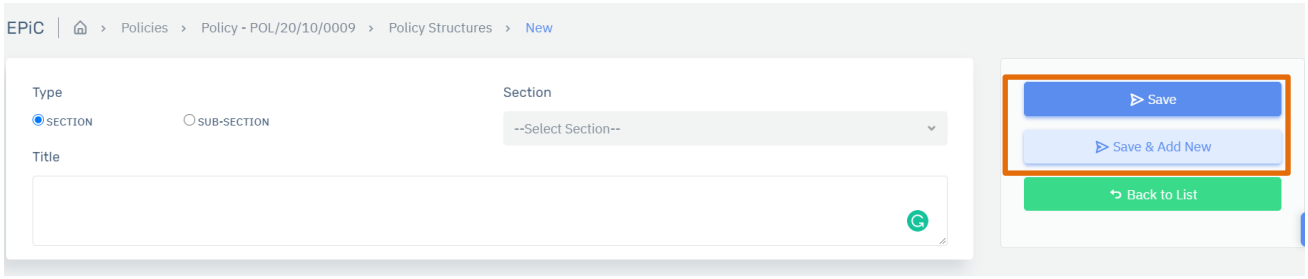


Figure 68: Creating a policy structure

Step 3. After typing the title and selecting the section you can choose **Save** or **Save & Add New** to continue adding more policy structures.

Step 4. When you save you will be redirected to **Figure 69** below. The policy structure created will be displayed as a list view.

Step 5. As indicated in **Figure 69**, you can choose to add a sub-section for any of the policy section by clicking the **+** plus icon.

Figure 69: List of policy structures

Step 5: Outcomes

This is the last step of Phase I. At this step the users can add outcomes of the policy document. Outcomes refer to descriptions of what the policy is trying to achieve and often include a measure of achievement. All outcome entries can be added to the section or sub-section of the policy. When the policy has several levels of desirable achievements (such as outcomes, sub-outcomes, etc), only the last and most detailed level needs to be entered as "outcomes."

Step 1. To add outcomes, click **Outcome** menu under Phase I as indicated in Figure 70 below. You can add the outcomes by clicking **Create New** button or the **+** icon next to each section or sub-section of the policy structure.

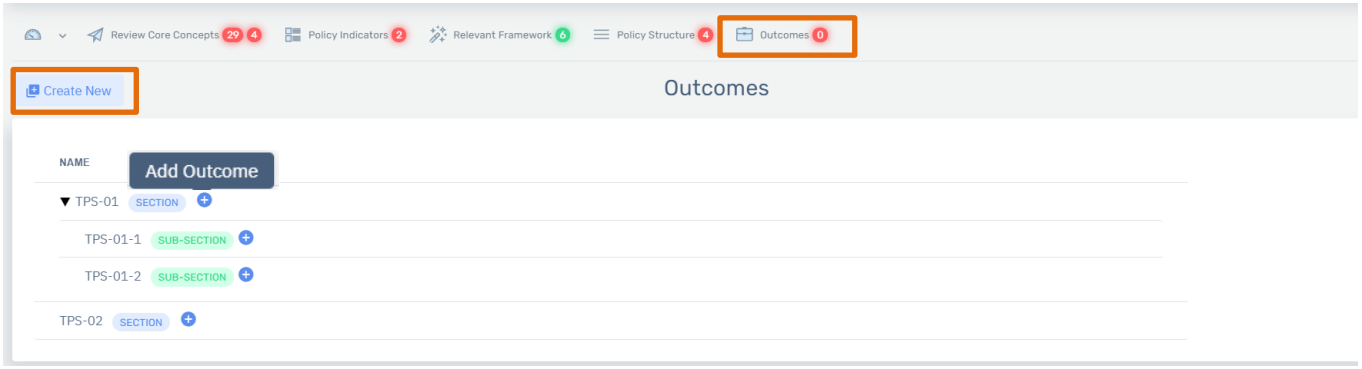


Figure 70: Outcomes window

Step 2. When Create New/Add Outcome is clicked, you will be redirected to Figure 71 below. Type the outcome in the space provided and check that it is under the correct policy section or sub-section.

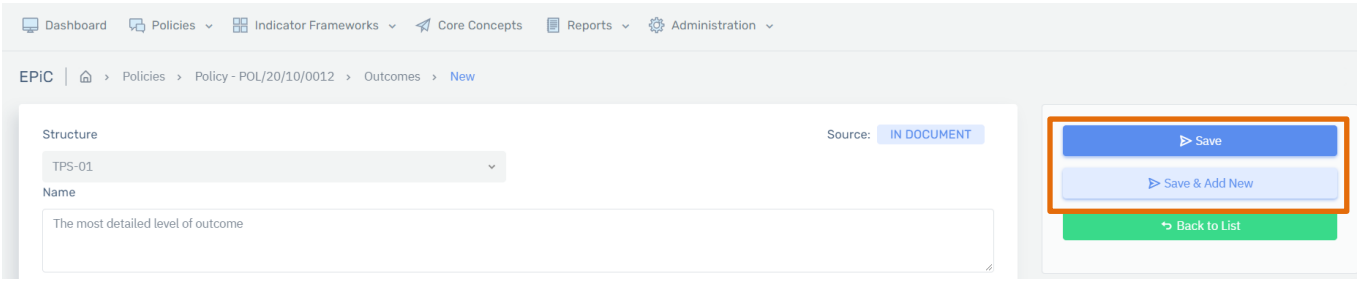


Figure 71: Creating an Outcome

Step 3. Once you filled in the Name field of the outcome, click **Save** or click **Save & Add** to continue. '

Step 4. All outcome entries will be displayed as shown in Figure 72 below.

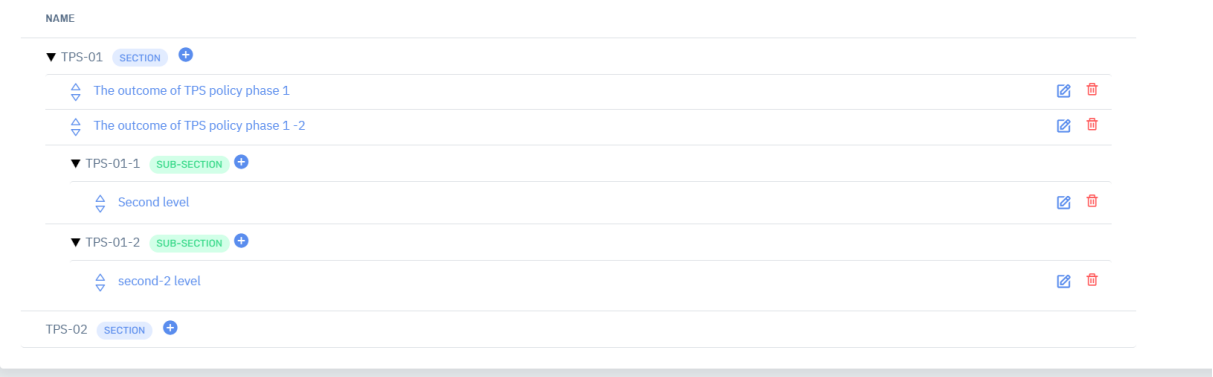


Figure 72: List of outcomes created for the policy structures

Step 5. Now that you have completed the last step for Phase I, you will need to move the policy to Phase II. A notification will appear on top of the window when the phase is successfully moved and changed. Please refer to How to Move a policy to the next phase for more details.

9.2.3 Phase II: Data entry of the Policy

The second Phase of the EPiC is designed for users to capture the key issues (or, Issues for Action: IA) in the document: priority issues which the policy is aiming to address, that require action. These IAs are generally located in the narrative of the document under a heading such as "Sector Constraints", "Key Development Issues", etc, but aren't always easy to identify. To tackle this situation, the EPiC user is initially asked to enter as best as possible each Issue for Action within each broad section of the policy document.

Important: The IAs can also be identified in the logframe of the policy document, so be sure to check this part of the document as well when undertaking this step.

Step 1: Initial IA

At this step the user identifies the key issues in the Policy referred to as Issues for Action, which form the basis for developing a strong indicator framework to monitor the policy. IAs can be extracted from the policy narrative and/or log frame (results matrix) of a given plan or strategy and added to EPiC as *initial* IAs.

Step 1. To enter the Initial IA, click the **Initial IA** menu under Phase II as indicated in **Figure 73** below. Then click **Create New** button, which will redirect the users to **Figure 74.**

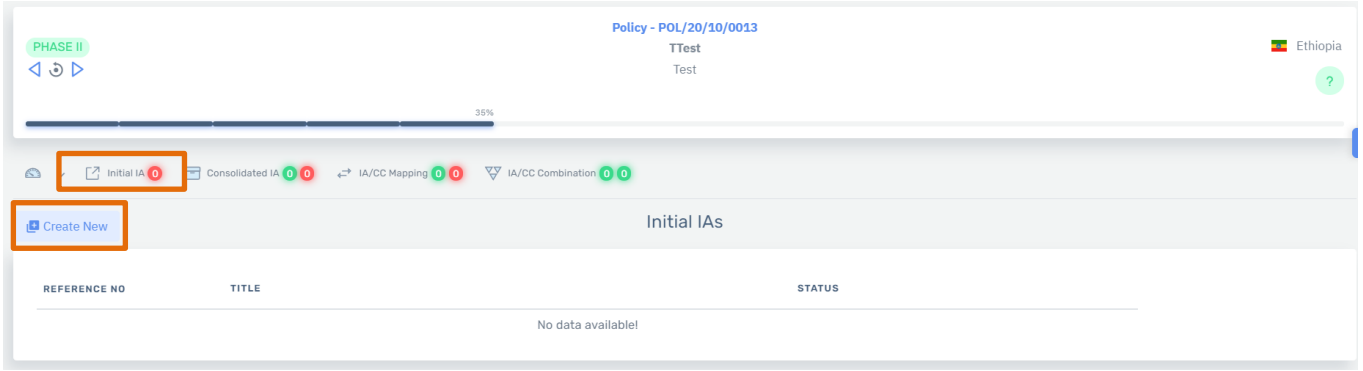


Figure 73: Initial IAs window

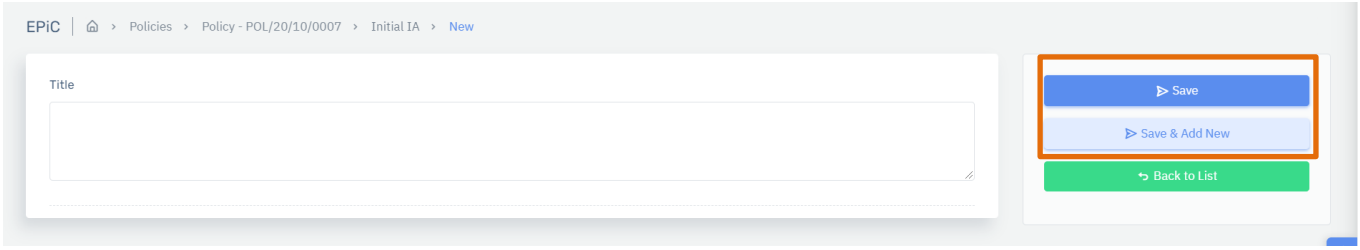


Figure 74: Adding Initial Issues for Action

Step 2. Users only need to provide the **Title** of the IA. To add more IAs, click **Save & Add New**. When you have added all the IAs click **Save**.

Step 3. Once the IAs have been added they will be displayed as shown in **Figure75** below.

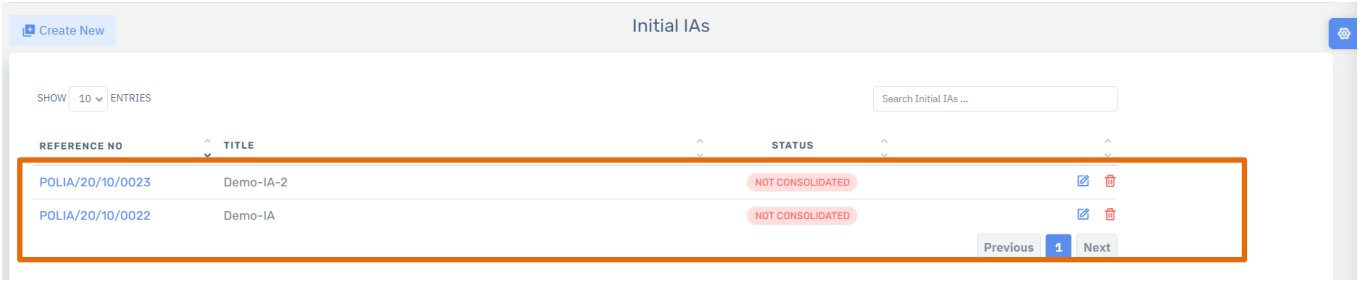


Figure 75: List of all the initial IAs added

Step 2: Consolidated IA

The second step of Phase 2 asks the EPiC user to simplify the list of initial IAs by consolidating them. The consolidation process removes duplication and reformulates the language to sharpen the description of the final set of IAs addressed by the policy. For each consolidated IA, users specify the corresponding reference population and target groups from the document, for which suggestions are also provided in the system.

A number of outcomes can occur at this step which include:

1. Merging 2 or more initial IAs into one consolidated IA if it is felt they are addressing a similar issue
2. Modifying the language of the initial IA to better describe the issue being addressed
3. Leave the initial IA as is, and convert to a consolidated IA

Important: all initial IAs need to be converted to consolidated IAs, so one of the three options above must be applied to each.

Another important part of the consolidation process is to identify for each consolidated IA, a reference population and target group(s). Identifying these groups can improve the inclusiveness of a policy and create demand for disaggregated statistics. The reference population refers to the overall population being addressed or impacted upon by the issue requiring action, and could include "All persons in the country", "Primary schools", "Health Care Facilities", and so forth.

Target groups on the other hand, are subsets of the reference population which may require specific focus due to their vulnerability or general importance to the issue at hand. These target groups may be explicitly specified or implied in the policy document. The EPiC user is also given the opportunity to make a recommendation for additional target groups (i.e., if it is not referenced in the policy document).

While it is generally preferable to enter each reference population and all relevant target groups, users can enter "N/A" in the fields when a reference population or level of disaggregation is irrelevant or not applicable to the issue.

Step 1. To start consolidating, click **Consolidate IA** menu under Phase II as indicated in **Figure 76** below. Then click **IAs Still to be Consolidated** menu.

Step 2. To start consolidation, click **IAs Still to be Consolidated** button.

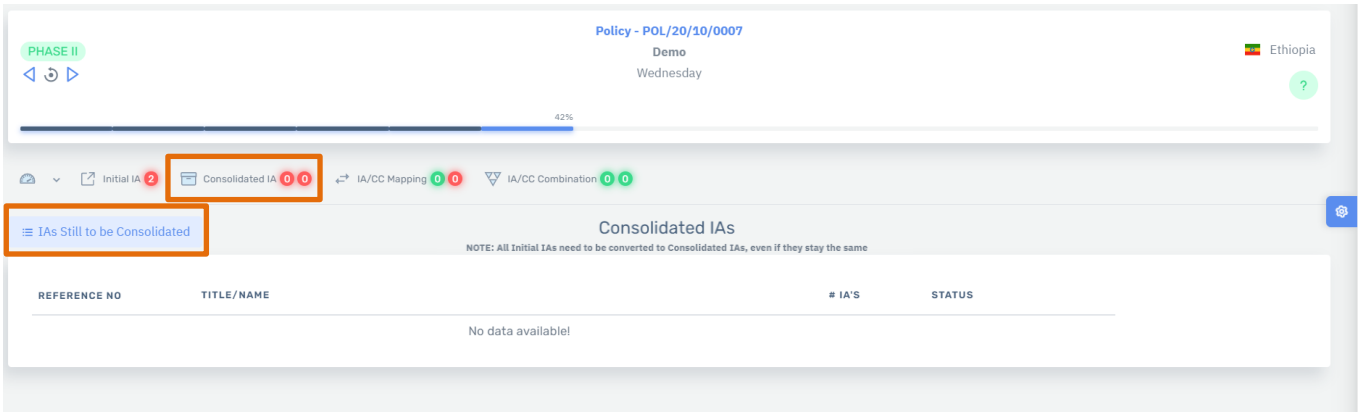


Figure 76: Consolidate IA Window

Step 3. As indicated in **Figure 77** below the list of unconsolidated Initial IAs will be displayed.

Step 4. From the list of unconsolidated IAs, please select and click the check boxes next to the IAs that are related and can be consolidated.

Figure 77: List of Unconsolidated IAs

Step 5. After selecting the IAs to be consolidated, click **Create Consolidate IA** as indicated in **Figure 77**.

Step 6. You will be redirected to **Figure 78** below to provide a description for the consolidated IAs.

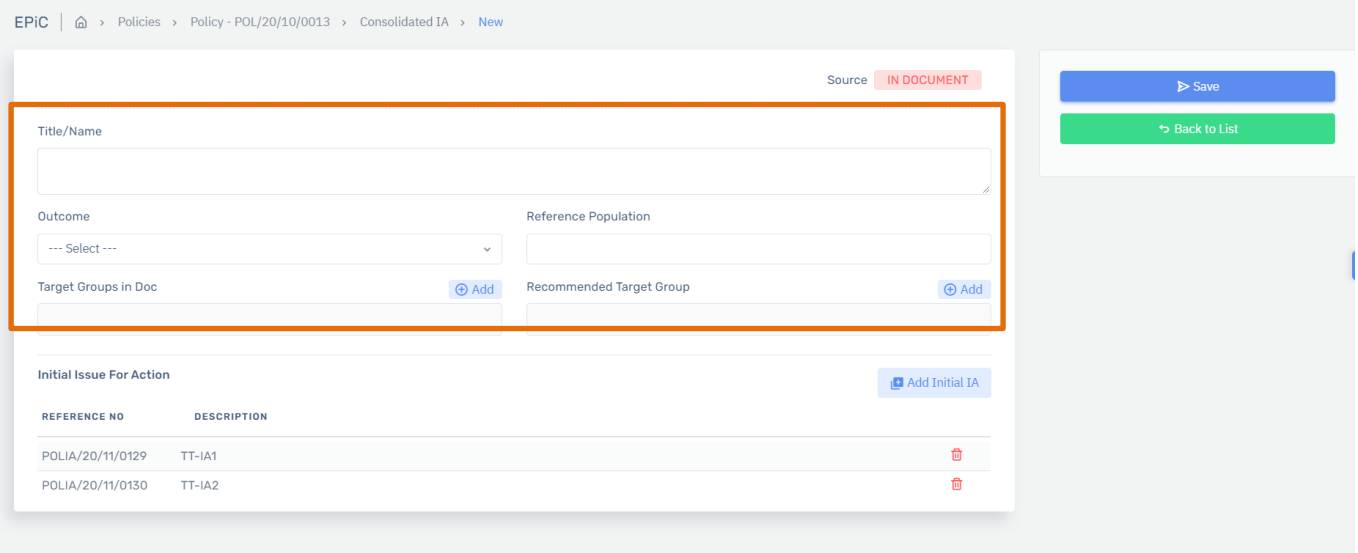


Figure 78: Adding additional meta data to the consolidated IA

Step 7. As in Figure 78, you can **Add Target Groups in Doc** (document) and/or **Recommended Target Group** by clicking the **Add** menu next to each field.

Step 8. The Select Target Group window shown in Figure 79 below will be displayed. From the displayed list choose all applicable target groups and click **OK**

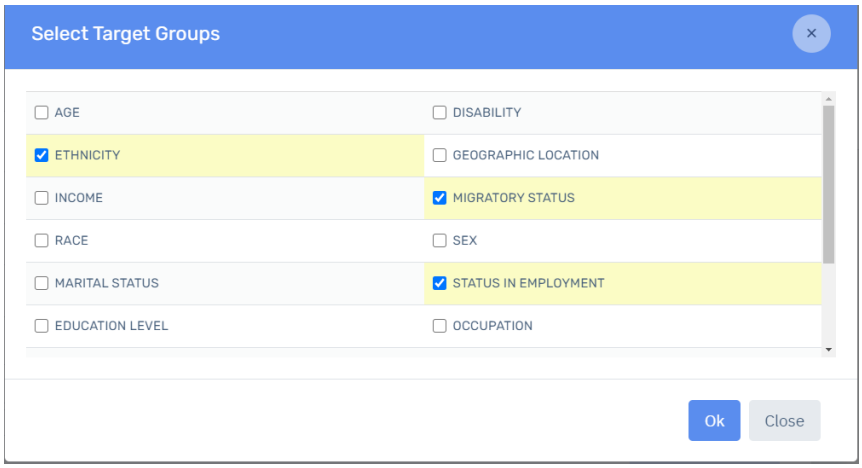


Figure 79: Adding Target Groups in Doc and/or Recommended Target Group

Step 9. As shown in Figure 80 below, selected target groups will be displayed. At this point you can also match the Outcome and Reference Population to the Consolidated IA.

Step 10. To add more Initial IAs to this consolidation, click Add Initial IA button as in Figure 80 below.

Step 11. When you have finished providing entries for this Consolidated IA, click on **Save** to continue.

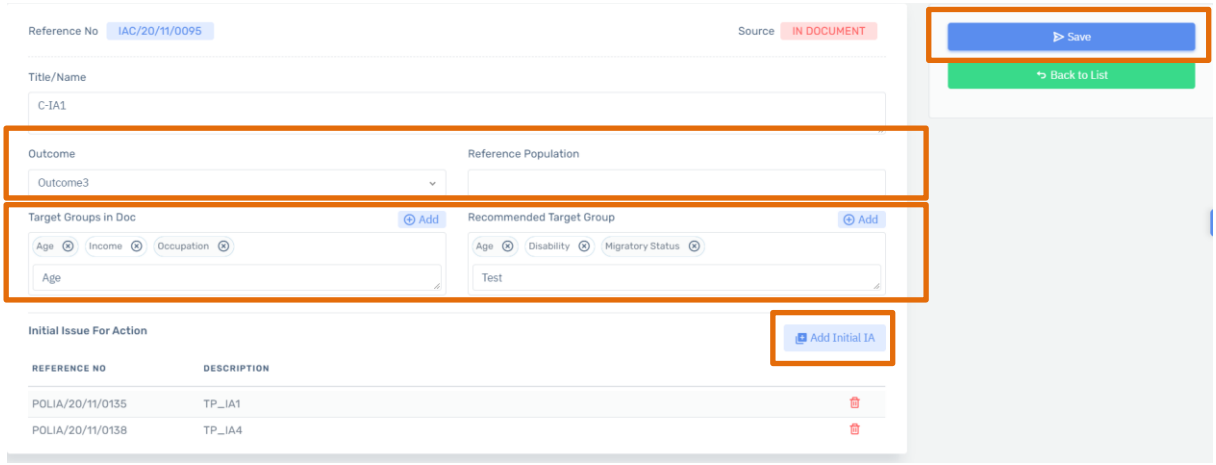


Figure 80: Save a consolidated IA after adding description

Step 12. After all IAs have been consolidated, the final displayed view will be as shown in **Figure 81** below. Users can quickly assess the status of consolidated IAs with icons and choose edit or delete options.

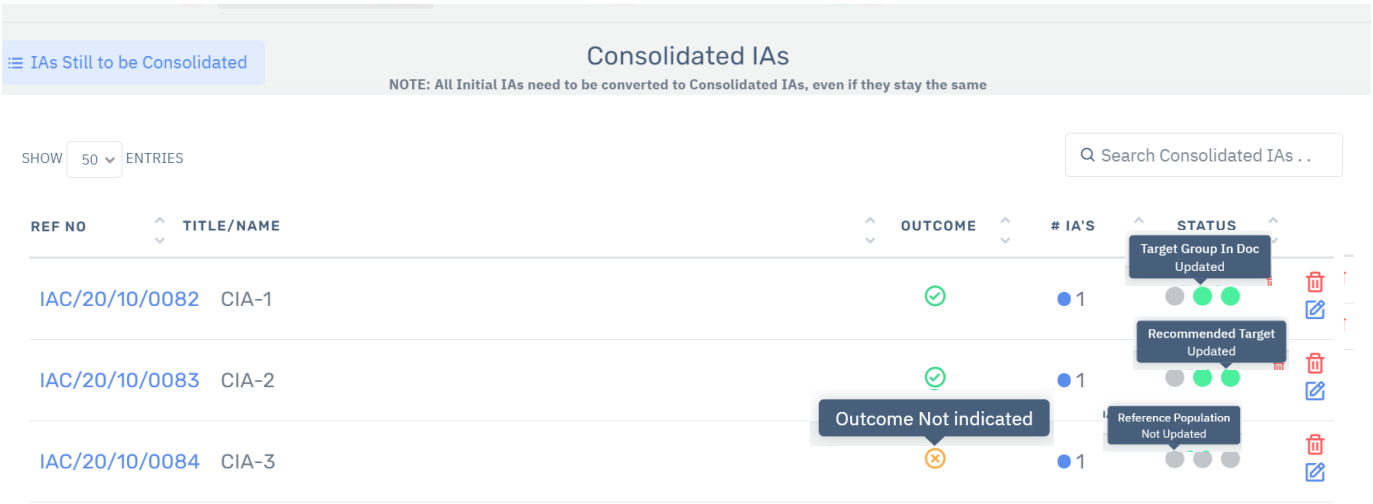


Figure 81: List of all consolidated IAs

Step 13. In the **OUTCOME** column

- ✓ The green check mark indicates that IAs are consolidated with a corresponding outcome.
- ✓ The yellow cross mark indicates that IAs are consolidated, without any associated outcomes.

Step 14. In the **# IAs** column, users can track how many initial IAs has been associated and added to a given consolidated IA

Step 15. In the **STATUS** column, three dots represent **Reference Population**, **Target Group in Doc** and **Recommended Target**, respectively.

- ✓ If you have added Reference Population, Target Group in Doc and Recommended Target Group when consolidating IAs, the icon will be displayed as green. If no entries have been made, the icon will be displayed as grey.

Step 16. To add more consolidated IAs and add descriptions, please repeat steps 3 to 11.

Step 3: IA/CC Mapping

At this step users are expected to revisit core concepts and map them to the consolidated IAs identified in the policy document. This is to delineate which principles are of most relevance to the issue at hand and the resulting outcome is what the EPiC Tool refers to as an "IA/CC Combination."

The user is required to tackle each consolidated IA one at a time, reviewing each of the 29 CCs against it to ascertain whether the CC is significantly applicable to that IA – those of relevance are selected.

Whilst more than one CC could be relevant to each consolidated IA, users should refrain from selecting too many CCs. It is not expected that more than 3 or 4 CCs should be selected for any consolidated IA.

Step 1. To start mapping IAs to CCs, click **IA/CC Mapping** menu under Phase II as in **Figure 82** below.

Step 2. The list all consolidated IA's and CC combinations will be displayed. If users have not completed this step, the list will display the status in red, as **NOT MAPPED YET.**

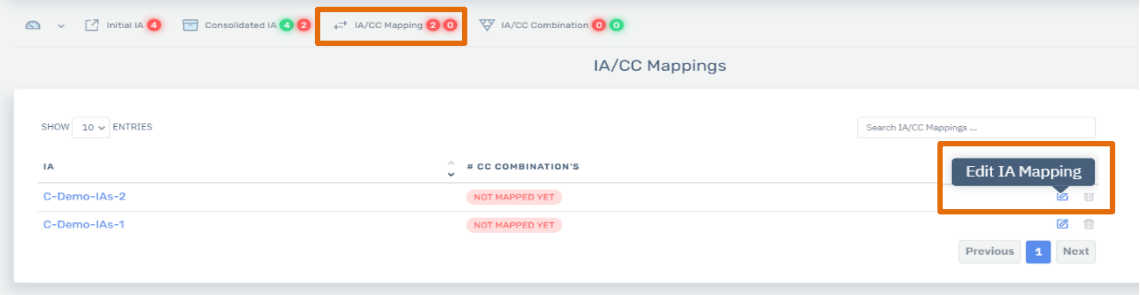


Figure 82: IA/CC Mapping Window

Step 3. To start mapping, click the **Edit IA Mapping** icon.

Step 4. When Edit IA Mapping is clicked for each consolidated IA, you will be redirected to **Figure 83** below. Click **Add Core Concept**.

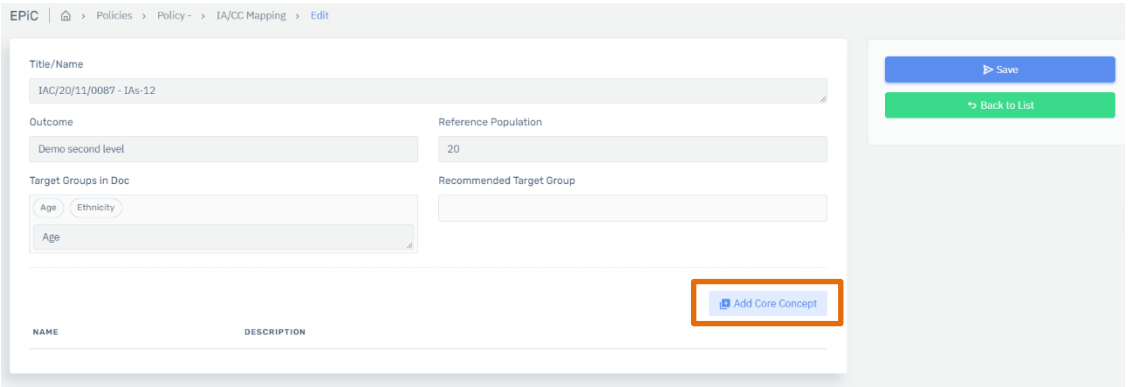


Figure 83: Adding Core Concepts to be mapped to the IAs

Step 5. The Select Core Concept window will be displayed as shown in **Figure 84** below.

Step 6. Select Core Concepts applicable to this IA in the checkbox and click **OK** to continue.

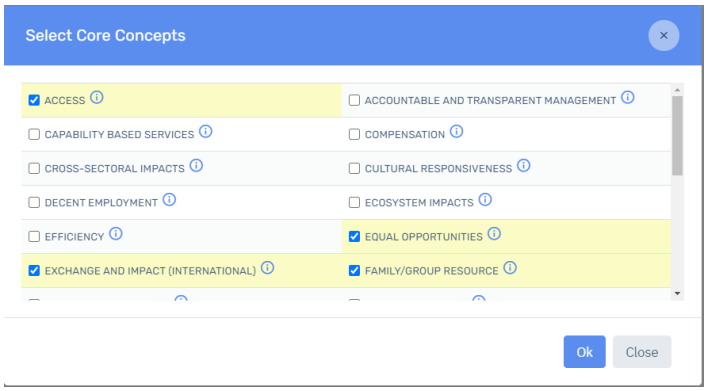


Figure 84: Select Core Concepts Window

Step 7. Selected core concepts will be added for the corresponding consolidated IA and will be displayed as shown in **Figure 85** below.

Step 8. Users can add more core concepts or click **Save** to save the changes, which will redirect users to the **IA/CC Mappings** page.

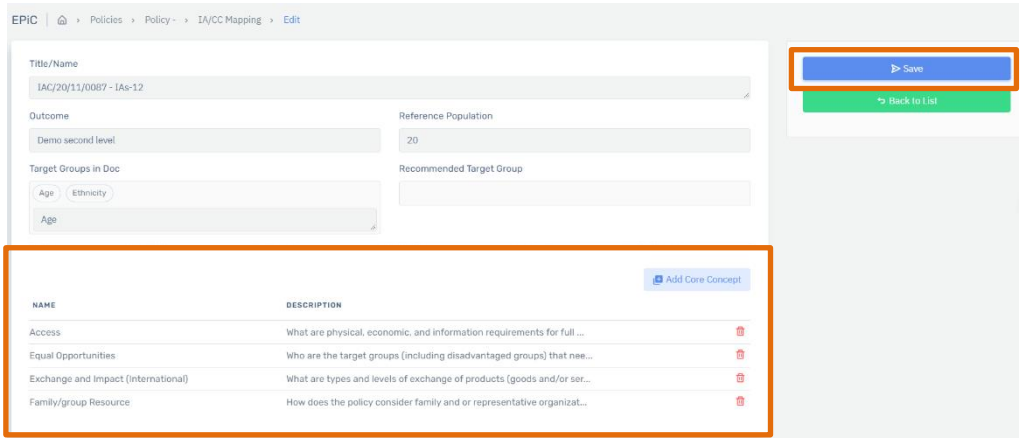


Figure 85: List of all mapped core concepts

Step 9. All core concepts mapped to the consolidated IA will be displayed. If there are consolidated IAs that are associated to the CCs, please repeat steps 1 – 9 above.

- ✓ As indicated in **Figure 86** below, users can check the status of IA/CC mapping. Those marked **NOT MAPPED YET** in the #CC COMBINATION column denotes all consolidated IAs yet to be matched to CCs.

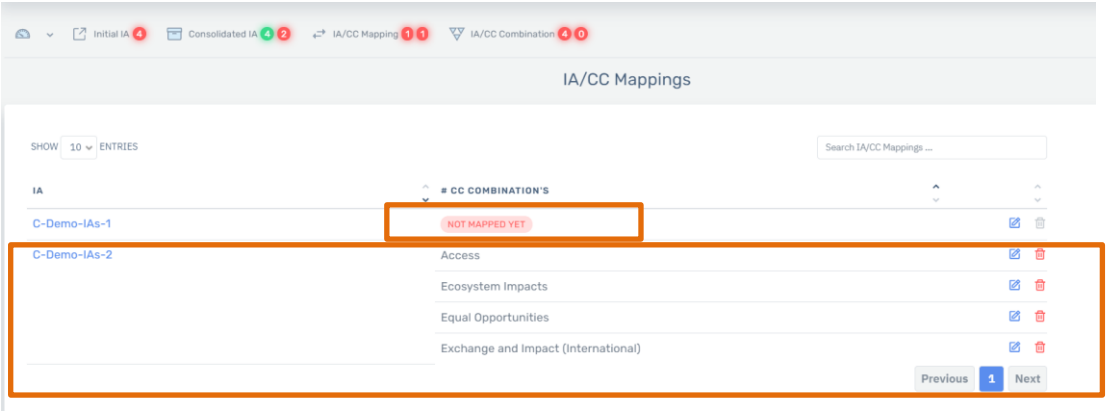


Figure 86: Consolidated IAs mapped with and without Core Concepts

Step 4: IA/CC Combination

At this step users can add indicators to the IA/CC combination. For each IA/CC Combination, the user is required to review the indicator lists considered relevant to the policy document;) Those entered from the policy document itself and ii) Additional National, Regional and Global indicator frameworks considered relevant. The user then selects all those indicators on these lists which could be appropriate in monitoring progress against each IA/CC Combination.

If an indicator is not necessary for monitoring progress against an IA/CC Combination, the user will have the option to indicate this, and provide a reason. There will be instances where no indicator can be identified from the indicator lists being reviewed – this is fine – it just means more thought needs to be given to potential indicators which could monitor that issue in Phase 4.

At this step, users can still add details to (or edit) the **Reference Population** and **Target Groups** associated with the consolidated IA. In particular, it may be the case that after adopting indicators for IA/CC combination, new target groups appear to be necessary. This will enhance the disaggregation requirements for indicators.

Step 1. To review and develop the IA/CC combination, click **IA/CC combination** menu under Phase II

Step 2. As shown in **Figure 87**, you can choose to view the IA/CC combination list **By IA/ By Core Concept**.

Step 3. Click **Add/Created Indicator** icon indicated in **Figure 87** to map indicators to the IA/CC combination.

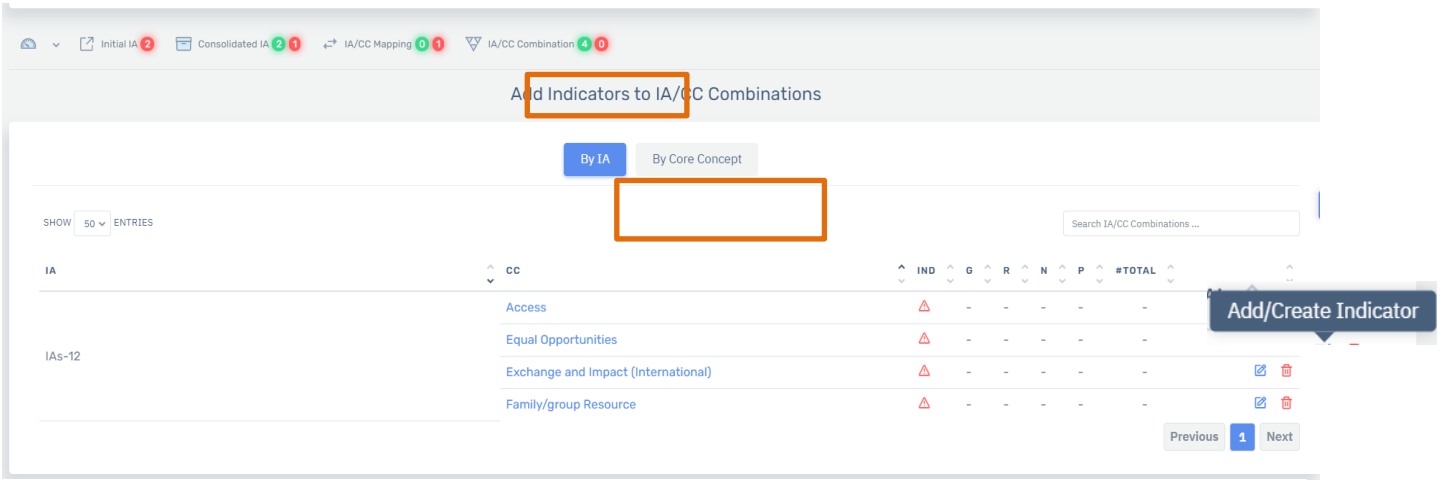


Figure 87: IA/CC combination window

Step 4. When the IA/CC combination window is displayed as shown in **Figure 88** below, select **Yes** or **No** for **Is Indicator Necessary** to proceed to associated steps:

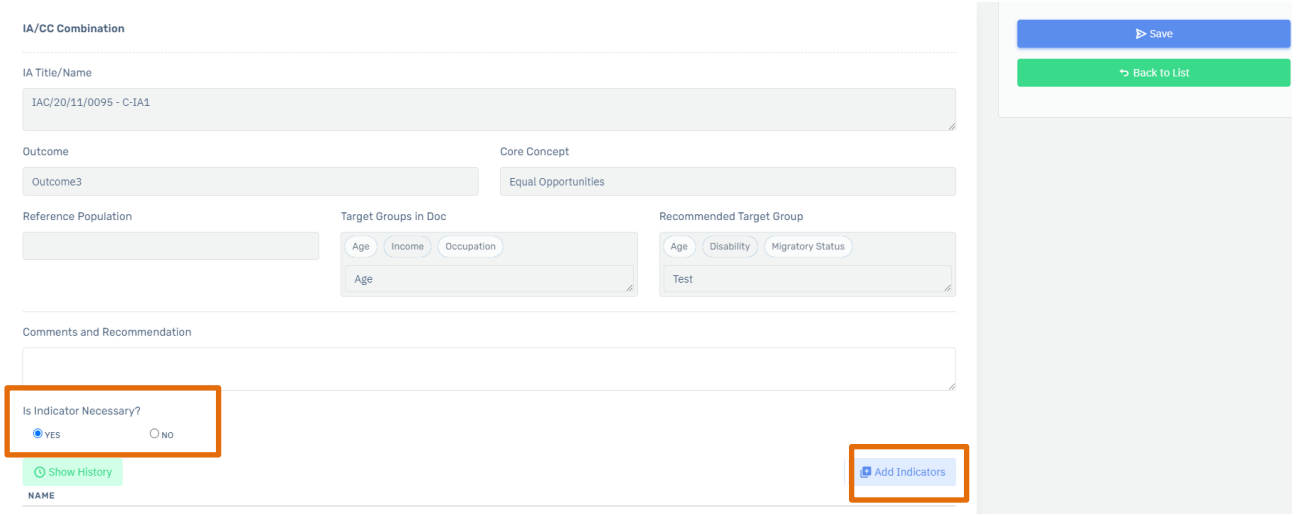


Figure 88: IA/CC combination Adding Indicators

Step 4.1. If you selected **Yes**, you will be redirected to the Select Indicator Window in **Figure 89**.

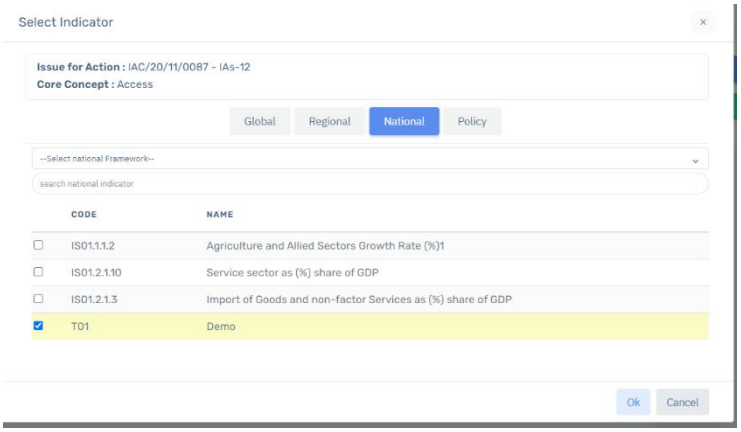


Figure 89: Select Indicator window

Step 4.1.1. Choose Regional, Global, National or Policy to browse and select relevant indicators.

Step 4.1.2. You can check the box and add indicators from a combination of frameworks. Click **OK** after selecting all relevant indicators.

Step 4.2. If you have selected **No**, add a reason for not having an indicator as indicated in Figure 90.

Figure 90: Add a reason for not having indicators

Step 5. After adding all indicators and clicking the **Ok** button, indicators will be displayed as in Figure 91.

Step 6. To add more indicators click Add indicator or click **Save** to change the changes.

Step 7. In Figure 92 below you can see the list of IA/CC combinations mapped to the indicator frameworks. The IA/CC combinations not yet mapped will have a warning display icon and a message in the tooltip.

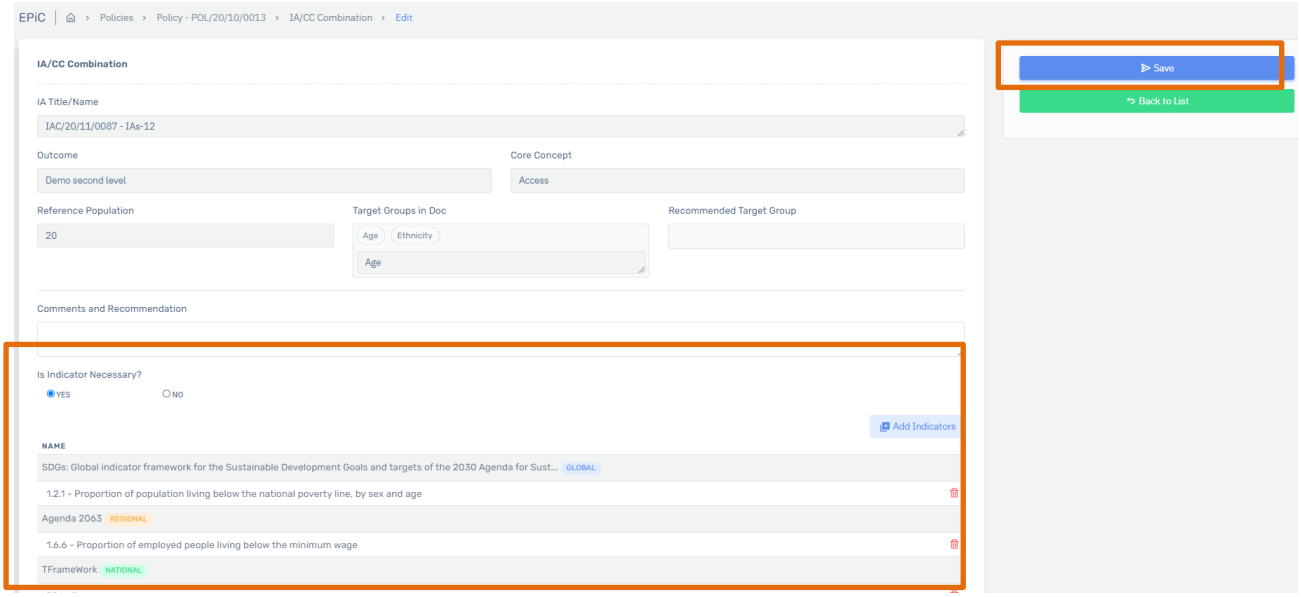


Figure 91: List of added indicators to IA/CC combination grouped according to their framework

Step 8. As shown in Figure 92 below, columns **G, R, N, P** distinguish the number of indicators added from Global, Regional, National and Policy indicator frameworks, respectively.

Step 9. Before moving on to the next step, make sure to map at least one indicator to each IA/CC combination.

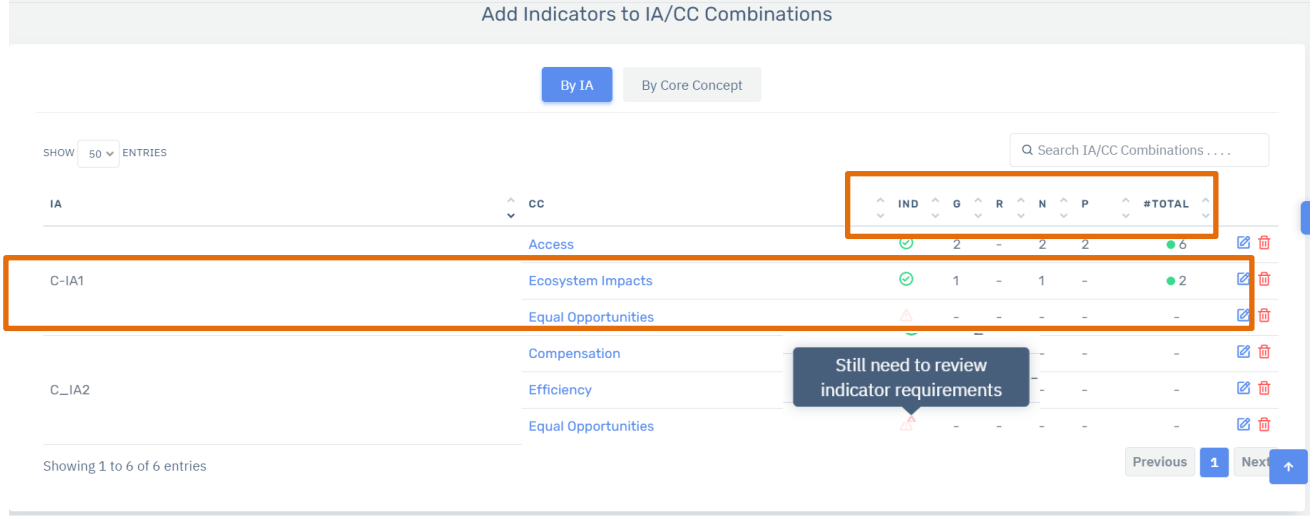


Figure 92: List of the IA/CC combinations after indicator have been added

Step 10. Now that you have completed the last step for Phase II, you can move the policy to Phase III. Please refer to How to Move a policy to the next phase for more details.

9.2.4 Phase III: Review of Policy Coverage

The third Phase of the EPiC tool will review the outcomes of Phase 1 and Phase 2 from a policy coverage perspective, which will allow users to assess how well the issues are aligned to outcomes and core concepts. From this assessment, users will be able to refine the coverage of the policy document and add new Issues for Action and their corresponding Target Groups that may have been overlooked.

Step 1: CC Coverage Review

At this step, users can assess the coverage of Core Concepts by reviewing their association with and alignment to the consolidated IAs. Users can check the frequency count of "Core Concepts" mapped to "Issues for Action" and assess if the frequency distribution is in line with the relevance. For instance, highly relevant CCs can be expected to have more IAs than those with lower or no relevance.

If a "highly relevant" or "relevant" CCs has not been mapped to many (or even any) of the IA/CC combinations identified in the policy document, it raises a flag that policy issues relevant to that Core Concept may have been overlooked in the document. The user is then required to consider if new key policy issues associated with that Core Concept should be addressed in the document and enter these as a new IA in the EPiC Tool.

Step 1. To start reviewing the core concept coverage, click **CC Coverage Review** menu under Phase III as indicated in **Figure 93** below. A list will display core concepts and associated IAs.

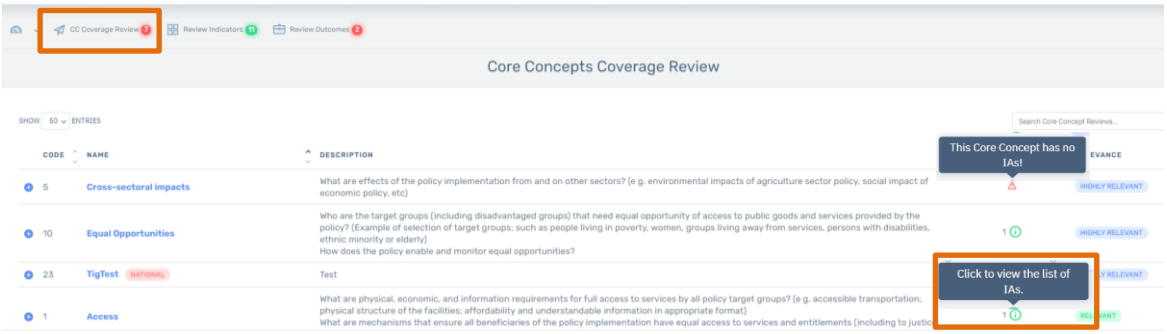


Figure 93: Core Concept Coverage Review window

Step 2. As indicated in **Figure 93** above, you check the relevance of CCs and number of associated IAs.

Step 3. When 'view the list of IAs' is clicked, the list of IAs will be displayed as shown in **Figure 94** below.

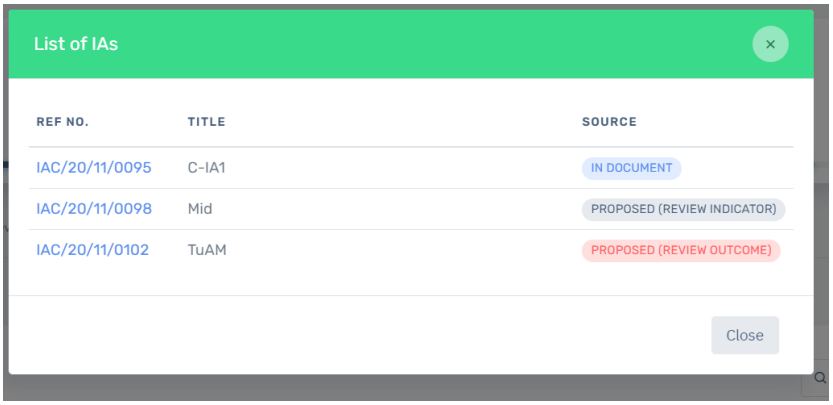


Figure 94: List of IAs

Step 2: Review Indicators

In this step, users review the indicators which have and have not been mapped to IA/CC combinations. If we recall in Phase 1 we firstly uploaded the indicators presented in the Policy Document and secondly identified relevant indicators from other indicator frameworks. Now, we would expect that those indicators are most likely mapped to the consolidated IAs identified in the policy document.

When this does not occur, it raises a flag that policy issues associated with those indicators may have been overlooked. The user is then required to consider if new key policy issues associated with that Indicator should be addressed in the document and enter these as a new IA in the EPiC Tool.

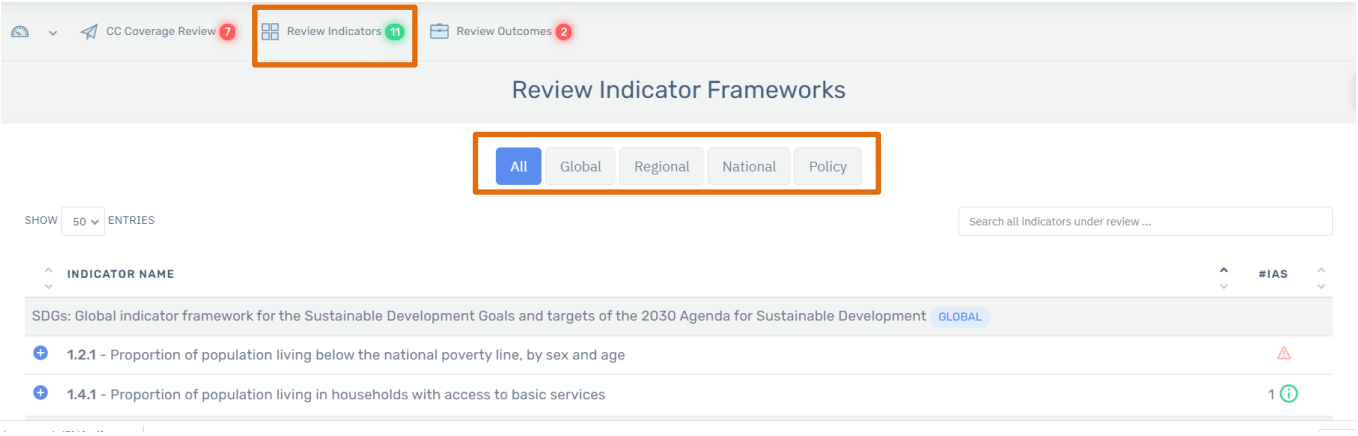


Figure 95: Review Indicator Frameworks window

Step 1. To review indicator coverage, click **Review Indicators** menu under Phase III as in Figure 95.

Step 2. You can review indicators from **All** indicator frameworks or select appropriate levels.

Step 3. As in Figure 96 below, red icons denote indicators not associated with any IA/CC combination and green icons will denote indicators with associated IAs and redirect users to the list of IAs.

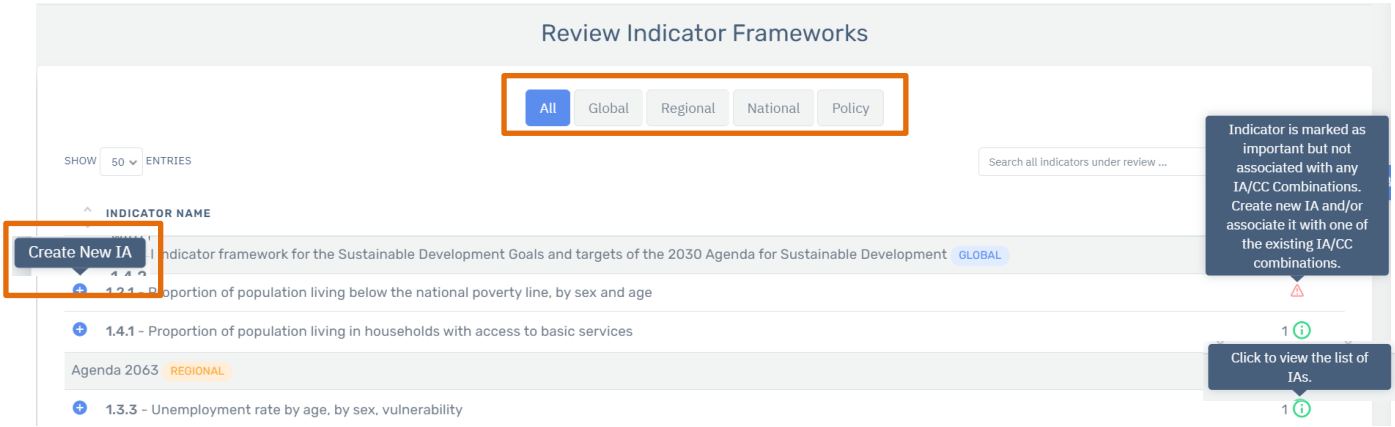


Figure 96: Viewing and Reviewing list of indicators with/without associated IAs

Step 4. For indicators not associated to any IA/CC combination, you can **Create New IA** as in Figure 96.

Step 5. When create new IA is clicked for a specific indicator, as in previous steps you have to **Create the IA** then **Add Core Concept** and **Add the indicators to the IA/CC combination**.

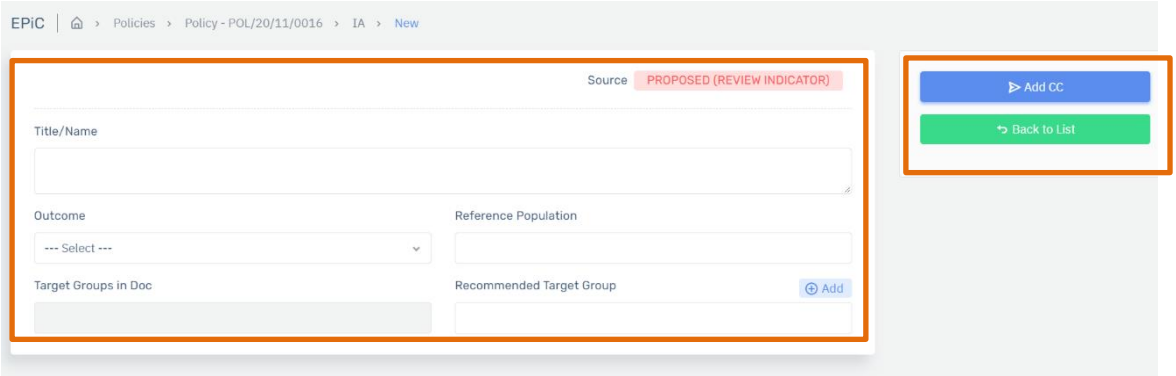


Figure 97: Creating a new IA on phase III

Step 6. IAs added at this review phase will be categorized as **PROPOSED.**

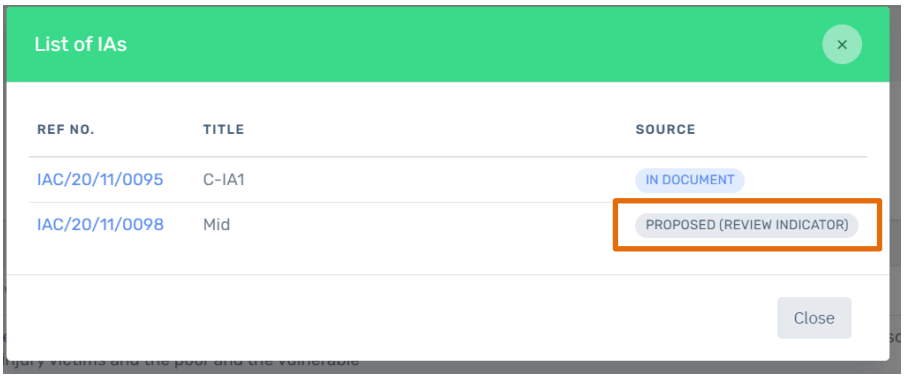


Figure 98: IAs created on Phase III will display as PROPOSED

Step 3: Review Outcomes

In the final step, users are required to assess the coverage of the policy document by reviewing the list of outcomes presented in the policy document and address those which have not been mapped to any consolidated IA. All outcomes specified in the policy document, should be addressing some key policy issue (IA). So, if some outcomes aren't mapped to an existing consolidated IA then the user is required to develop an IA description for that outcome and add it to the EPiC Tool.

Similarly, every consolidated IA should ideally have an outcome associated with it. If not, user is required to enter an outcome into the EPiC Tool, and have this mapped back to the consolidated IA without outcome.

Step 1. To review an outcome, click **Review Outcome** menu under Phase III as indicted in **Figure 99** below.

Step 2. For Outcomes without any IAs, an instruction to **Add IA To This Outcome** will appear, and when clicked, a message in a red pop-up window will further indicate that IAs are not associated with an outcome, as below.

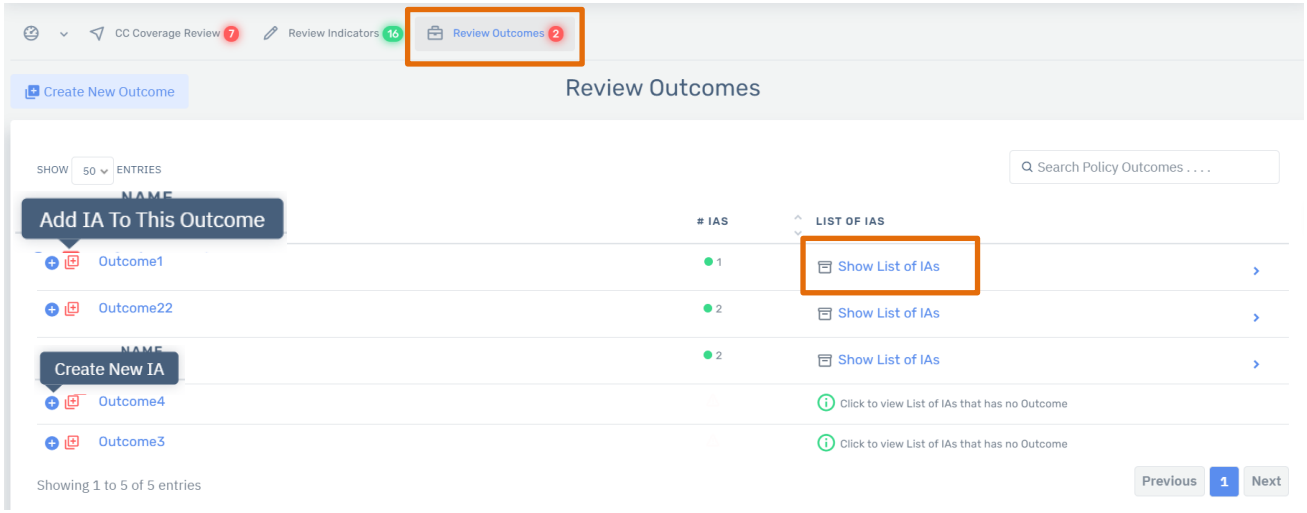


Figure 99: Review Outcomes window

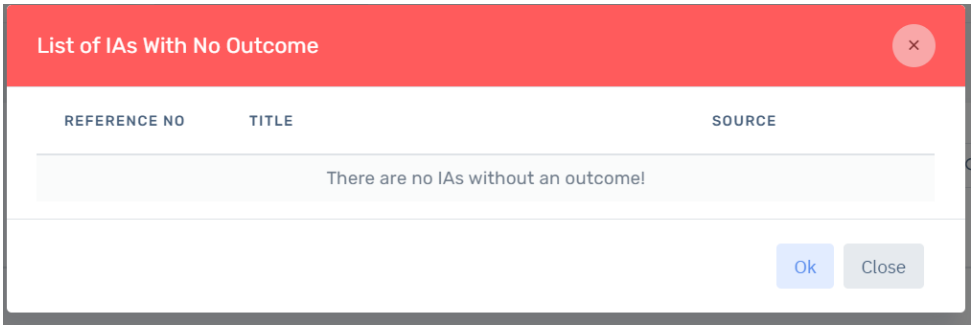


Figure 100: List of IAs with no outcome

Step 3. For Outcomes missing IAs, you can propose a new IA by clicking the **Create New IA** icon in **Figure 99**. As in the previous phase, **Add Core Concept** and **Add Indicators to the IA/CC Combination**.

Step 4. When you have reviewed all outcomes, you can view each outcome in a comprehensive list, with an option to view which corresponding IAs are mapped, as indicated in **Figure 101** below.

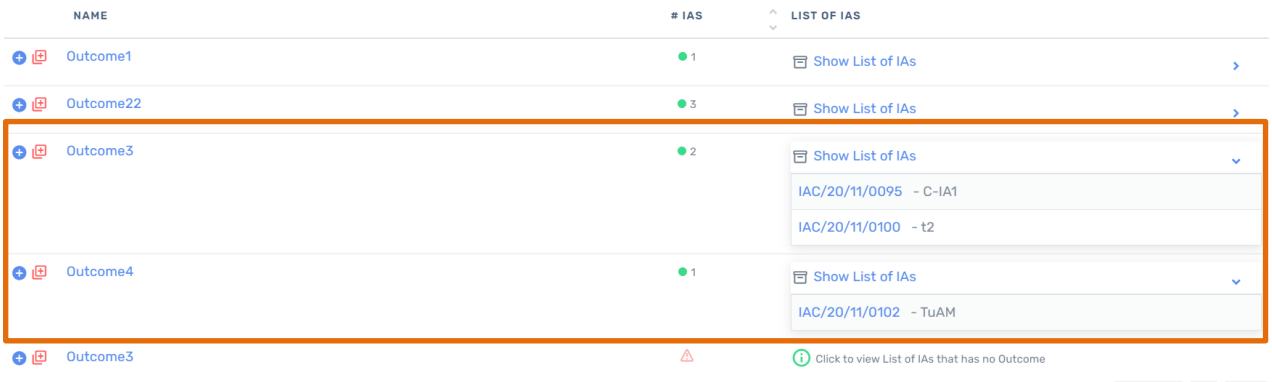


Figure 101: Viewing the list of outcomes and mapped IAs

Step 5. Now that you have completed the last step for Phase III, you can move the policy to Phase IV. Please refer to How to Move a policy to the next phase for more details.

9.2.5 Phase IV: Review of Indicator Framework

The fourth and final phase of the EPiC process focuses on fine tuning and thus finalizing the indicator framework which will monitor the progress of all key issues addressed in the policy/strategy document.

Step 1: Review IA/CC combination

The fourth and final phase of EPiC will allow users to fine-tune the indicator framework by reviewing and refining the choice of indicators and target groups for each IA/CC Combination. Users will also be required to review, and revise where necessary, the target groups for disaggregation. When finalizing the choice of indicators, a couple of key scenarios exists for those cases where an indicator is required:

1) The IA/CC Combination has a suitable indicator suggestion from the mapping already identified, in which case this indicator may be adopted
2) The IA/CC Combination has either no indicator suggestions from the mapping, or the suggestions are not considered satisfactory, in which case a newly proposed indicator needs to be suggested or reasons for its absence can be provided.

The second part of the step is finalizing the target groups, which will in turn become the "levels of disaggregation" required for the final selected indicators. The user will need to review what has been suggested already in Phases 2 and 3 and make a final decision of what target groups should be adopted. This will entail selecting from the proposed target groups already suggested but could also involve adding a further target group if felt necessary. When the review is complete with inputs from relevant stakeholders, users can approve the IA/CC Combination and finalize the indicator framework.

Step 1. To Review IA/CC combination in Phase IV, you will be automatically redirected to **Figure 102** below. You can choose to view the comprehensive IA/CC combination list either **By IA** or **By Core Concept**.

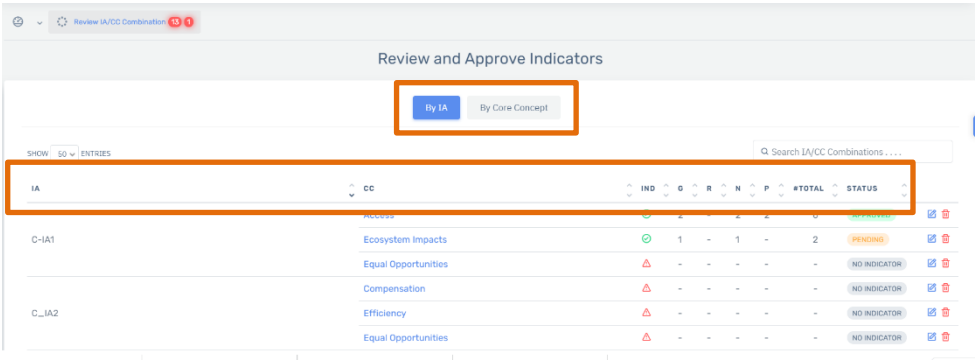


Figure 102: Review IA/CC combination window

Step 2. As indicated in Figure 103 below, columns **G, R, N, P, #Total** display the total number of indicators and those added from Global, Regional, National and Policy frameworks, respectively. The **Status** column displays the status of the IA/CC Combination. To approve an IA/CC combination at least one Indicator should be associated with the IA/CC combination and the status should be PENDING.

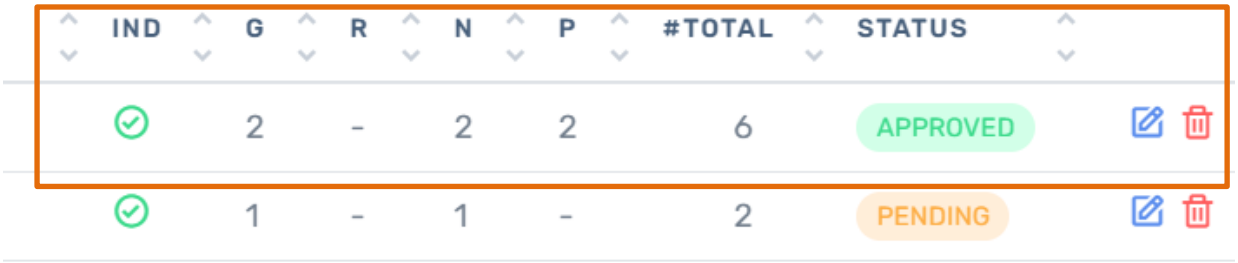


Figure 103: Description of the columns on phase IV

Step 3. In Figures 102 **and** 103 above, you can see which IA/CC combinations are **PENDING** approval.

Step 4. If an IA/CC combination is not associates to at least one indicator, the status will show as **NO INDICATOR**.

Step 5. When an IA/CC combination with the **PENDING** or **HOLD** status is opened, you will be redirected to Figure 104 below. In this step you can:

- ✓ Add Indicators or Create Indicators
- ✓ Copy existing Target Group or Recommended Group
- ✓ Add new target groups by clicking **ADD TG**, which will redirect you to Select Target Group window (See Figure 79 above)
- ✓ **Approve** or **Hold** the policy

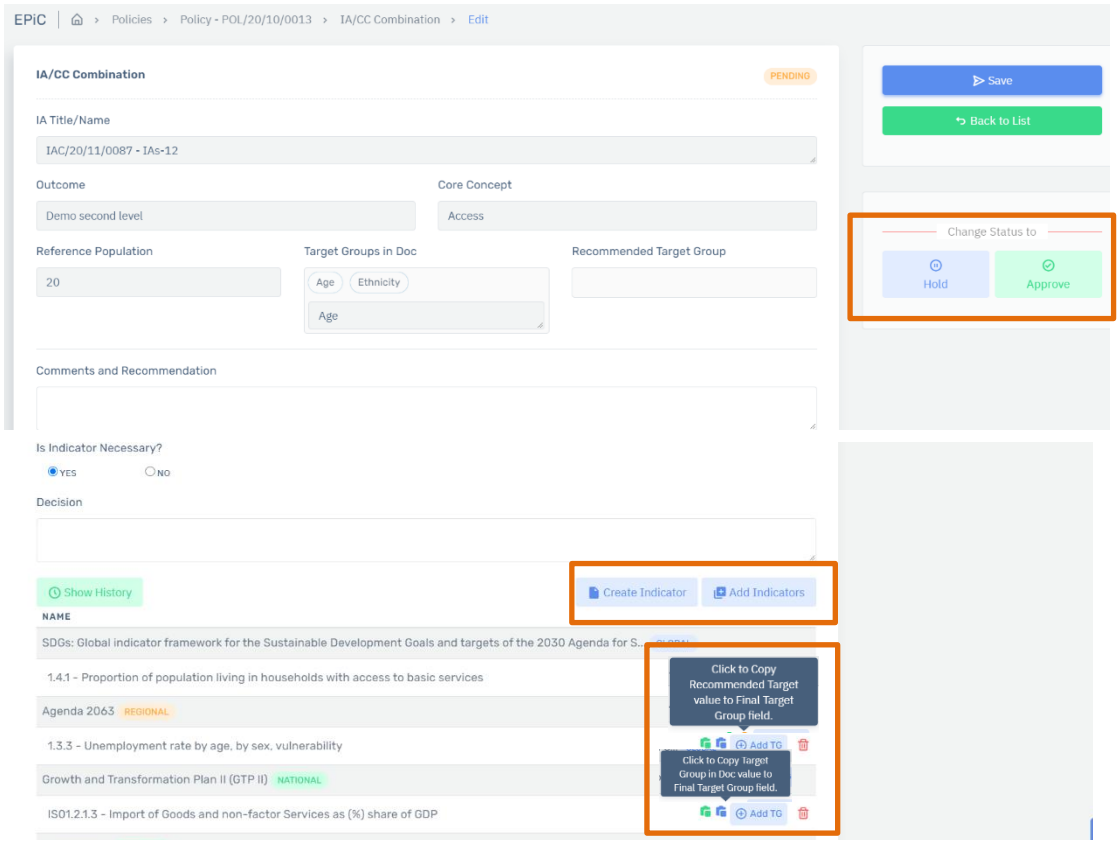


Figure 104: Reviewing an IA/CC combination with status PENDING

Step 6. When an IA/CC combination with the **NO INDICATOR** status is opened, you will be redirected to **Figure105** below.

Step 7. You can select **Yes** or **No** to the field 'Is Indicator Necessary' for a given IA/CC combination. if you select **Yes**, you will need to **Add Indicators** or **Create Indicator**

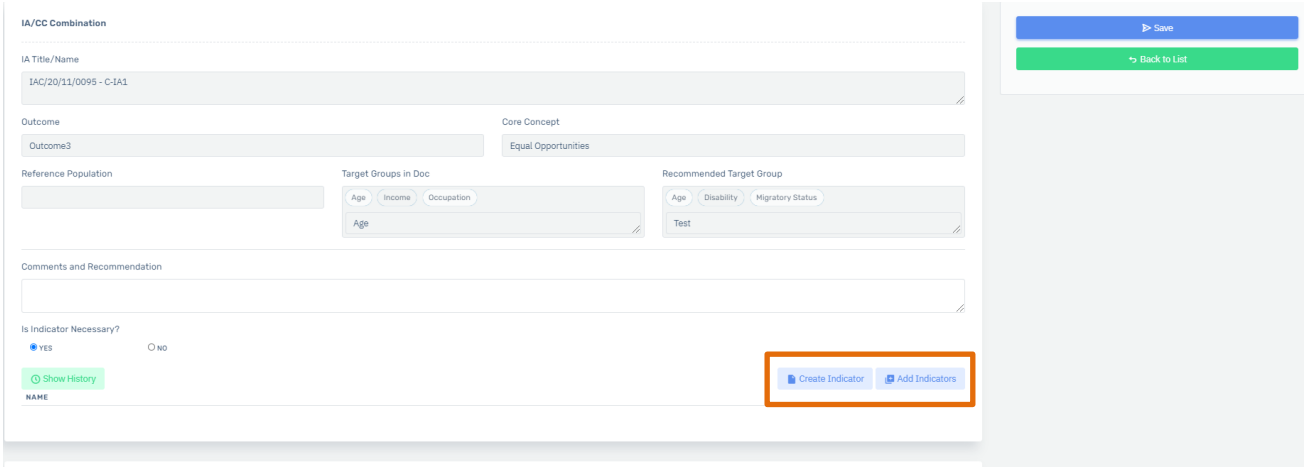


Figure 105: Reviewing an IA/CC combination with status NO INDICATOR

Step 7.1. When **Add Indicators** is selected, the Select Indicator window will open, as in **Figure 106**.

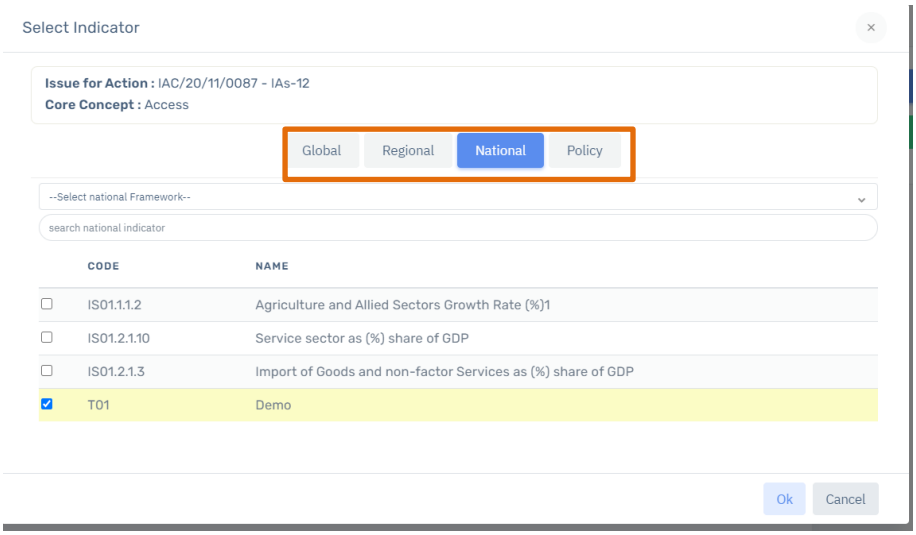


Figure 106: Select Indicator window

Step 7.1.1. From the list of indicators, select Global, Regional, National or Policy and choose relevant indicators. You can add a combination of indicator frameworks.

Step 7.1.2. Click **OK** after adding all the relevant indicators.

Step 7.2. When **Create Indicator** is selected, you will be redirected to the Create Indicator window as indicated in Figure 107 below. Type in the **Code** and **Name** of the Indicator and click con **OK.**

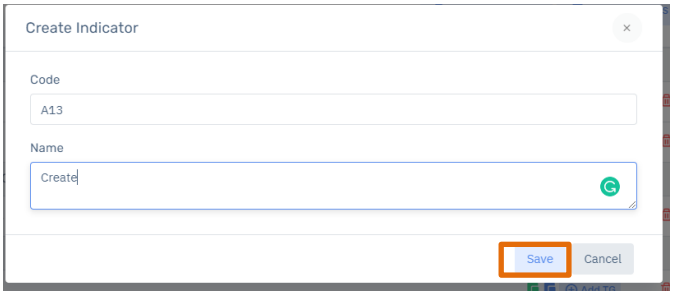


Figure 107: Create Indicator window

Step 8. After Adding or Creating and clicking the **Ok** button, new indicators will be displayed as indicated in Figure 108 below. You can differentiate between the added and created indicators. The created indicators will have the icon next to the name and tooltip will show **Source: Proposed (Indicator)**. Users will be able to view the edit history by clicking the green button marked **Show History**.

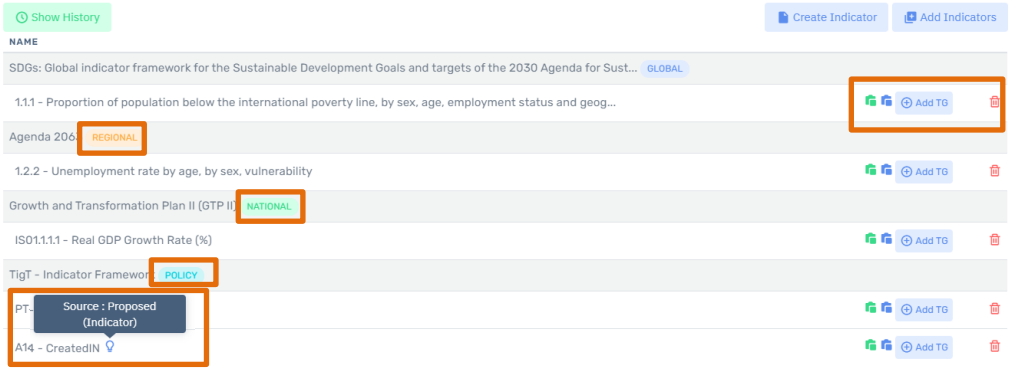


Figure 108: List of added Indicators added to IA/CC combinations the were not associated

Step 9. In Figure 108 above, icons next to each indicator will allow users to add target groups. As shown in Figure 109, users edit **Target Groups**

Step 9.1. The green icon will copy and add all Target groups entered in previous phases to the final target group.

Step 9.2. The blue icon will copy and add all Recommended target groups entered in previous phases to the final target group.

Step 9.3. You can also click **ADD TG**, to add to the final target group.

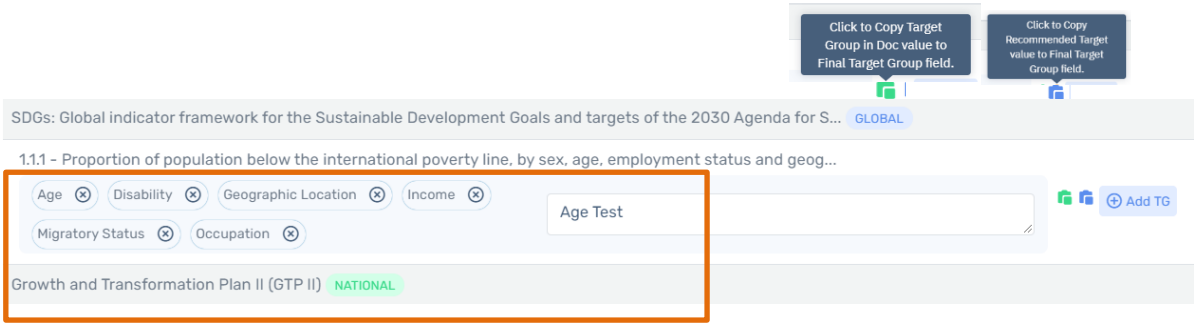


Figure 109: Options to add target groups to the final target group

Step 10. To save the changes, click **Save** from the screen shown in Figure 105 above. The status will change to **PENIDNG**.

Step 11. If the review on a given IA/CC combination is complete, you can choose to **Hold** or **Approve** the combination. When either option is selected, you will be prompted with a confirmation window. Click **OK** to continue.

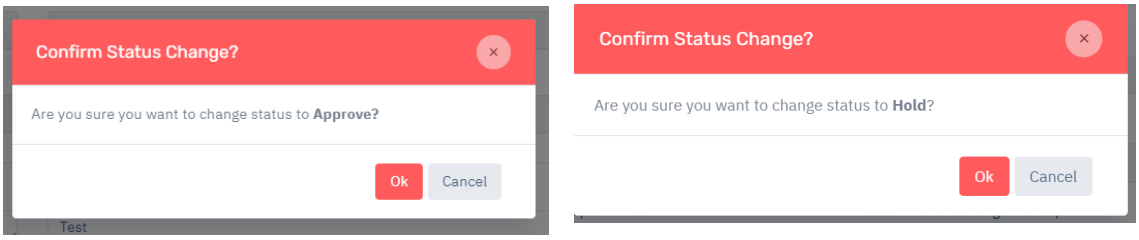


Figure 110: Confirmation prompt window for **Approve** or **Hold** IA/CC combination

Step 12. Repeat the steps above to review and finish for each IA/CC combination.

9.3. How to Move a policy to the next phase

Step 1. To move the phases, click on the policy reference number found at the top as in Figure 111 below.

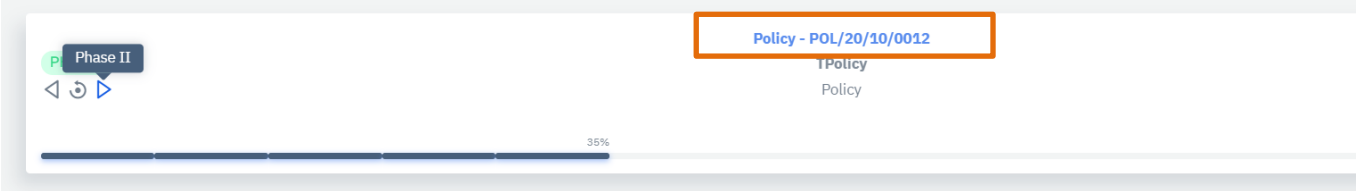


Figure 111: Policy reference number

Step 2. When the policy reference number is clicked, you will be redirected to the policy edit page.

Step 3. As indicated in **Figure 112** below, you can choose the Phase in the **Move Policy To** section. Depending on the current phase, you can move the policy to the previous or next phase.

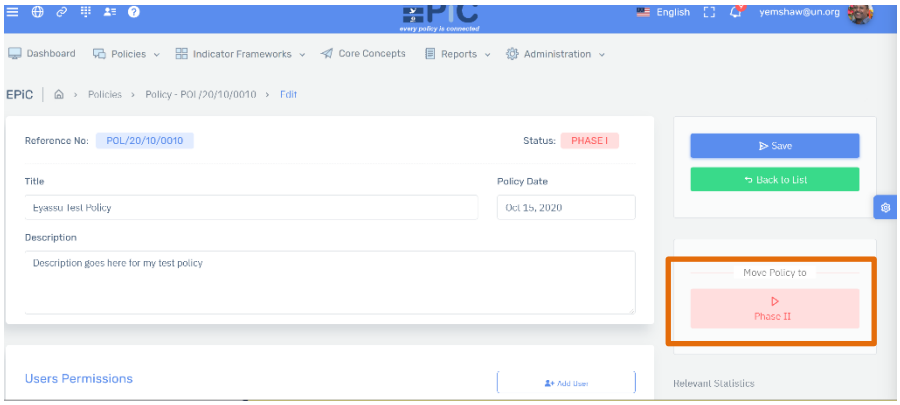


Figure 112: Edit policy page

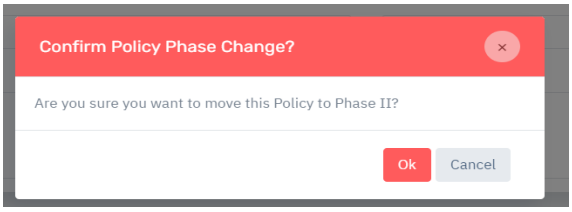


Figure 113: Confirmation window for moving a policy to the next or previous phase

Step 4. When you move the phase, you will be prompted to confirm the change. Click **Ok** to continue.

9.4. How to Generate Output Report for a Policy

Step 1. To generate an output report at the policy level, go to the **Policies** menu and select a policy to generate the report for.

Step 2. After you have opened the policy, click on the **Reports** menu. As indicated below, additional report sub-menus for each phase will be displayed. Choose the phase you wish to create a report for.

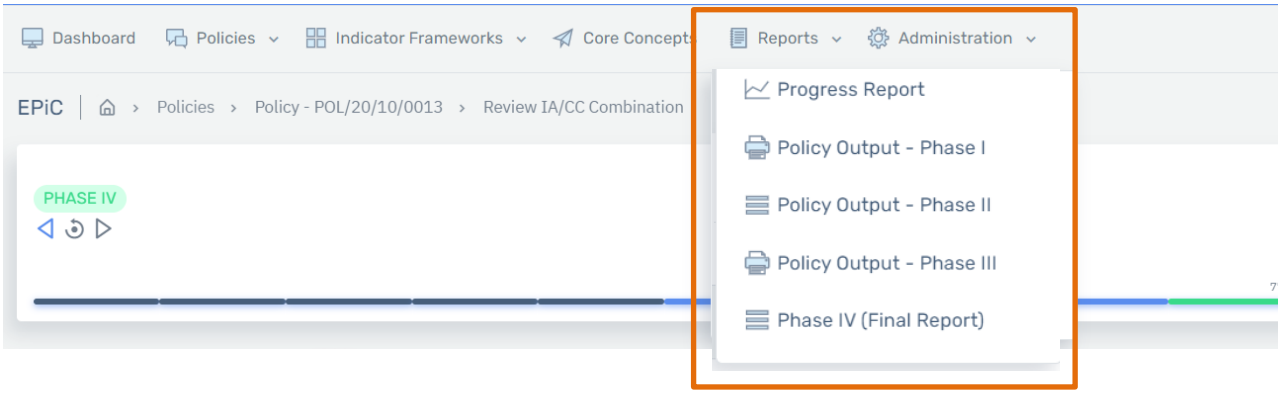


Figure 114: Report sub-menus available for each phase

Step 3. If you select reports for **Phase I/ Phase II/Phase III**, each phase option will generate a unique phase output report. As indicated in **Figure 115** below, users can access output reports of each phase. Outputs associated with the phase can be viewed separately or downloaded all in one-go.

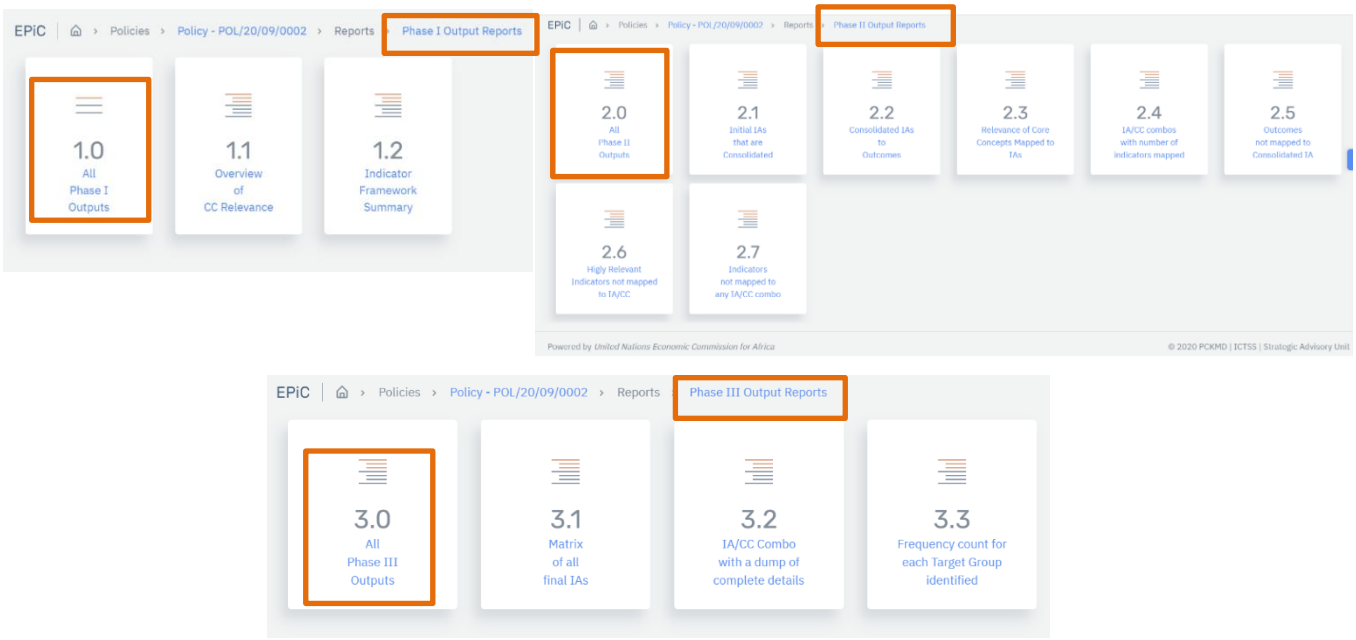


Figure 115: Phase I, Phase II, Phase III output reports that can be generated

Step 4. Users can select individual outputs (e.g., **1.0**, **2.0** and **3.0**). For instance, **Figure 116** below displays the report generated when **1.2** from **Phase I Output Reports** is clicked.

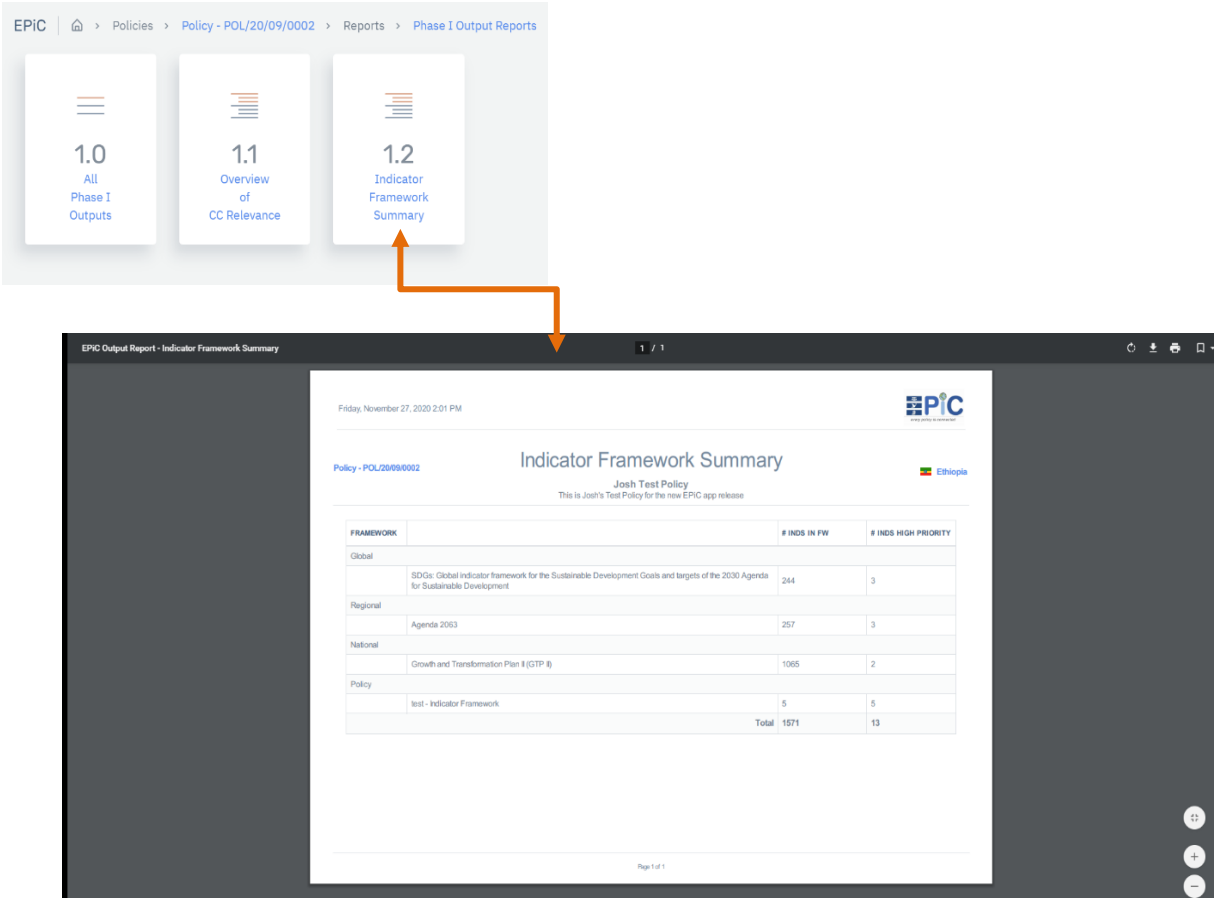


Figure 116: Phase Report for Individual Outputs

Step 5. When **Phase VI (Final Report)** sub-menu is selected, a final comprehensive summary report for the policy will be generated. The report includes graphical representation and table summary of the outcomes of all four phases. All elements of the table are interactive.

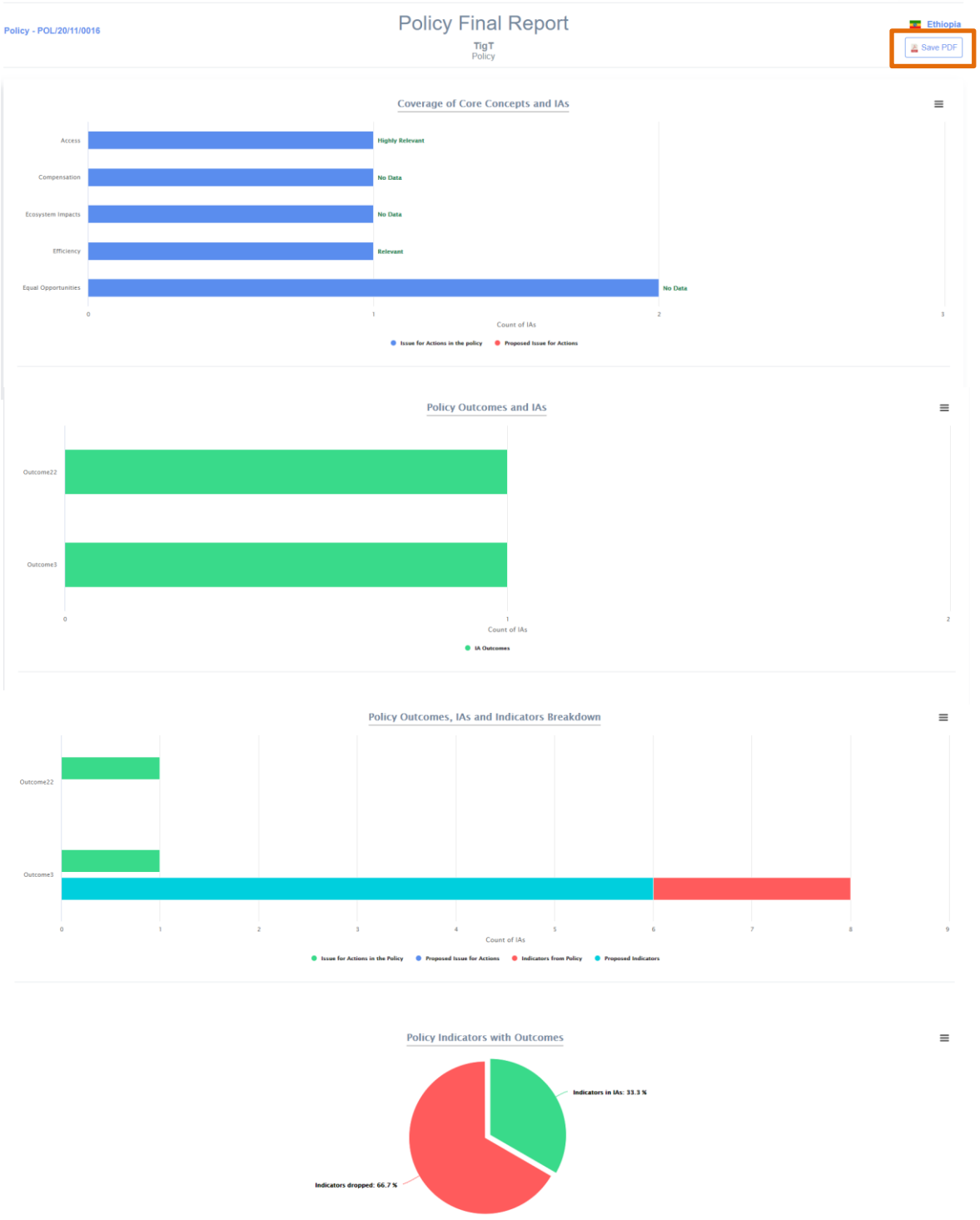


Figure 117: Phase IV - Final report generated for a policy

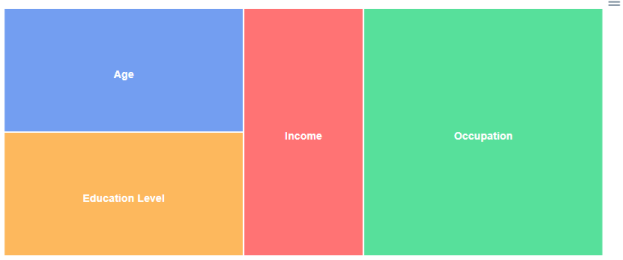
Issue for Actions with Outcomes Mapped to Indicators

Issue for Action		Outcome		Indicators
Description	Location	Description	Location	Description
C-IA1	IN DOC	Outcome3	IN DOC	Industry Sector Growth Rate (%)
				Proportion of men, women and children of all ages living in poverty in all its dimensions according to national definitions
				Proportion of population below the international poverty line, by sex, age, employment status and geographical location (urban/rural)
				Real GDP Growth Rate (%)
				TT-Pol1
				TT-Pol3
C_IA2	IN DOC	Outcome22	IN DOC	-

Indicators with Target Group Disaggregation

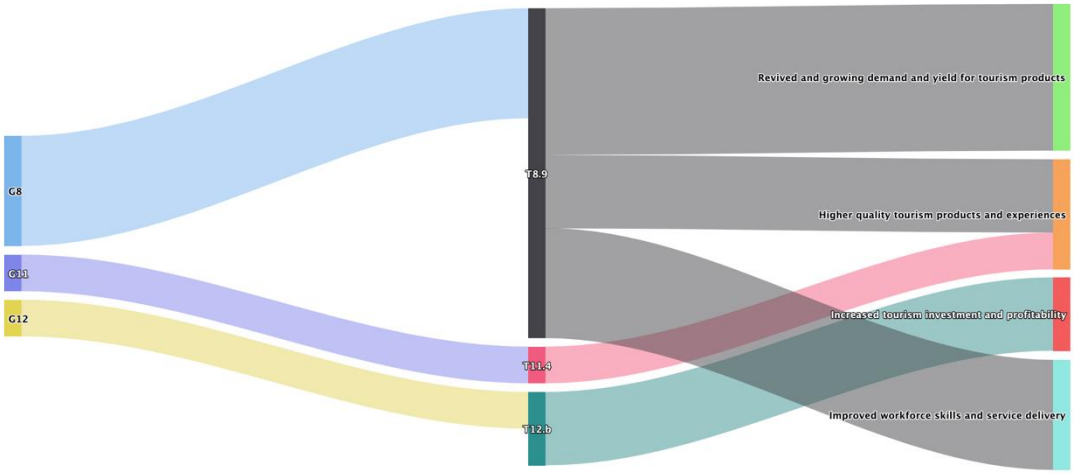
INDICATOR	LEVELS OF DISAG	SOURCE	COMMENT
1.1.1 - Proportion of population below the international poverty line, by sex, age, employment status and geographical location (urban/rural)	Age, Disability, Geographic Location, Income, Migratory Status, Occupation	GLOBAL SDGs: Global indicator framework for the Sustainable Development Goals and targets of the 2030 Agenda for Sustainable Development	
1.2.2 - Proportion of men, women and children of all ages living in poverty in all its dimensions according to national definitions		GLOBAL SDGs: Global indicator framework for the Sustainable Development Goals and targets of the 2030 Agenda for Sustainable Development	
IS01.1.1.1 - Real GDP Growth Rate (%)		NATIONAL Growth and Transformation Plan II (GTP II)	
IS01.2.1.1 - Industry Sector Growth Rate (%)		NATIONAL Growth and Transformation Plan II (GTP II)	
PT-1 - TT-Pol1		POLICY	
PT-3 - TT-Pol3		POLICY	

Target Groups Proposed



Target Groups Covered by Policy Document

SDG Goals and Targets Mapped to Outcomes



Phase IV - Final report generated for a policy

Step 6. To save the report as a PDF file, click **Save PDF** located at the top-right corner in Figure 116.

Step 7. You will be redirected to Figure 118 below.

Step 8. Before you save please make sure the Destination field is set to **Save as PDF** by clikcing the drop-down, as it might be set to the default printer name you commonly use.

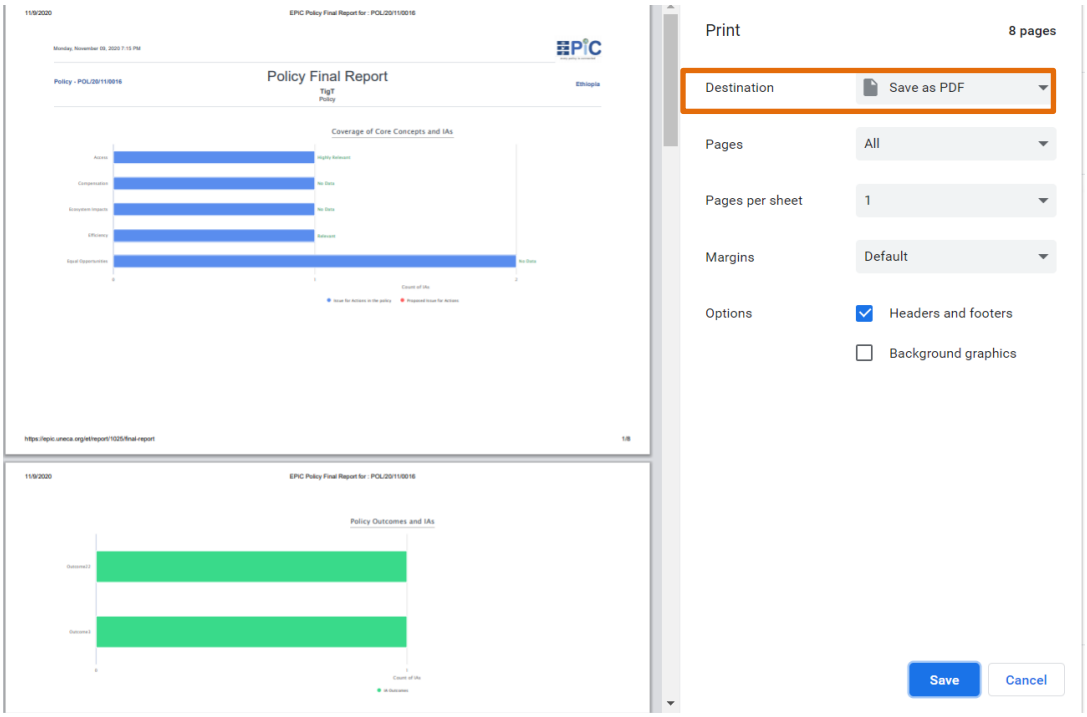


Figure 118: Saving Phase IV generated report as pdf

Step 9. The final report contains multiple sections. If you prefer to save and/or print individual graphical representations separately, click the icon as indicated below and choose from the list of options.

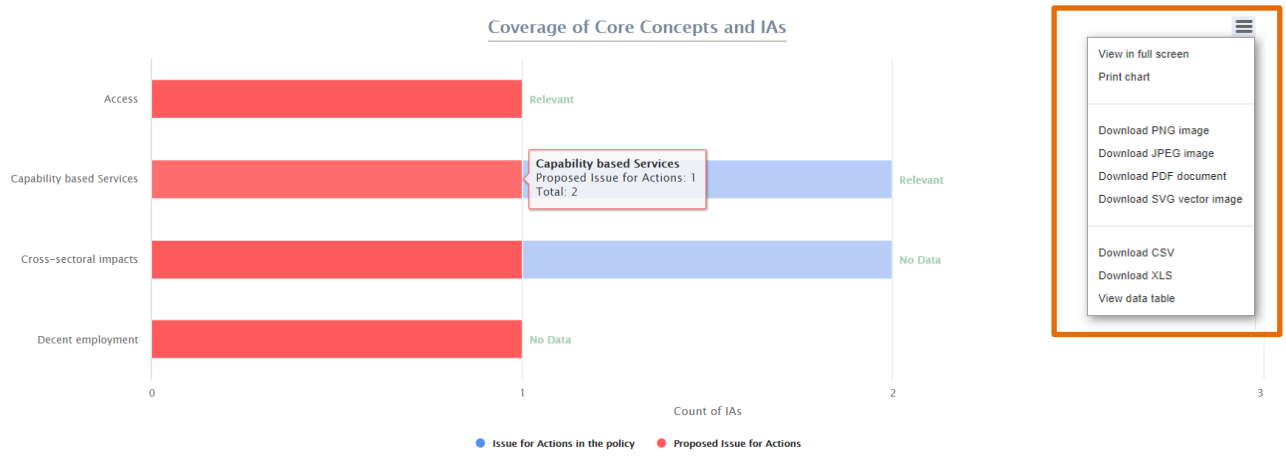


Figure 119: Options available for a particular graphical representation